

**Access to Microfinance
And
Improved Implementation
Of
Policy Reform
(AMIR Program)**

Funded By
U.S. Agency for International Development

Public Relations Seminars

Technical Report
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December, 1998

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Preface

This report was prepared by the association consultant **Larry Milner** under subcontract to the Center for International Private enterprise (CIPE) and under the direction of the Deputy Director of CIPE, **Mr. Keith Miceli**. The report **was** completed only with the cooperation and coordination of Dr. Zaki Ayoubi, the **BAI** Component Leader for the **AMIR** Program operated by Chemonics International, Inc., and with the cooperative participation in the staff and members of the Jordanian business associations.

Executive Summary of the AMIR Seminars

On December 10 and 12 at the Marriott Hotel in Amman, Jordan, the AMIR-Jordan Program conducted two seminars for the staffs and leaders of ten Jordanian business associations. These sessions were entitled “Public Policy Advocacy and Issue Analysis” and “Public Relations in Public Policy Advocacy.” The aim of the two seminars were to expose the Jordanian association participants to the fundamental concepts, strategies, and tools of conducting lobbying programs, of issue analysis, and of supporting public relations campaigns.

This report includes the lesson plans that were used, copies of the overhead transparencies that were shown, and copies of some of the advocacy, issue, and public relation materials, which was shown and discussed during the two three hour sessions.

The instructor **was** Larry Milner, association consultant for the Center for International Private Enterprise (CIPE). A Certified Association Executive (CAE) and former president and chief executive officer of the Texas Chamber of Commerce, he has written and edited *Business Associations for the 21st Century, A Blueprint for the Future*. He has worked **as** a consultant with business associations in many countries.

These key points were made during the seminar sessions:

- Jordan business associations should have a **more professional public policy advocacy program** aimed at securing passage of laws and regulations favorable to the members of the business community which **create jobs** for the people of Jordan.
- Leaders of associations must understand **how policy is made** in a democratic society, the steps for developing public policy advocacy programs, and the strategies for influencing policy.
- Associations must understand existing governmental and parliamentary processes.
- Business associations must learn the modern concepts, strategies, and techniques that are being used around the world for **encouraging openness and transparency** in government.
- Associations should expand their **information base** to provide information to the government on how laws and regulations affect the organization’s members.
- Business groups must utilize **grassroots** organizational approaches to be successful in advocating policy changes.
- Results in advocacy can be achieved by **networking** with other like groups in order to accomplish common goals.
- Associations must form **coalitions** of like minded business leaders to push for fundamental reforms, which would benefit all the citizens **of** Jordan.

During the seminar sessions, discussions were held on the current approach to advocacy now used in Jordan. Also the existing parliamentary and administrative processes were analyzed. Practical solutions were outlined for advocacy obstacles that either exist or are perceived to exist. The success of the program can be partially measured by the fact that the association executives decided after the seminar to meet on a regular basis to discuss common opportunities, programs, and problems.

AMIR Program

**“The Role of Business Associations in
Policy Advocacy and Analysis”
Workshop**

Thursday, December 10, 1998

09:00 a.m. - 12:00 p.m.

Marriott Hotel - Amman

GUEST LIST

- *Amman Chamber of Commerce*
Mr. Mohammed Al- Muhtaseb
Mr. Hisham Dweik
- *Jordan Exporters and Producers Association For Fruits and Vegetables*
Ms. Maha Shawareb
Ms. Nadal Jweihaan
Mr. Abdel Rahman Ghaith
- *Amman World Trade Center*
Mr. Ra'ed Bilbeissi
- *Business and Professional Women Club*
Ms. Hind Abdel Jaber
Ms. Rasha Barghouti
Ms. Wijdan Al- Saket
Ms. Manal Shammout
Ms. Hanan Al- Qennah
- *Jordan Businessmen Association*
Mr. Ahmad Al Shafai
- *Jordan Trade Association*
Mr. Halim Abu Rahmeh
- *Institute of Management Consultant of Jordan*
Mr. Hatem Abdel Ghani



- *Jordan Society of Tourist & Travel Agents*
Mr. Yousef Al Maswas
Mr. Zeyad Al- Shamas
- *Jordan Construction Association*
Mr. Basel Al-Ghusain
- *Community Development Group (CDG)*
Ms. Linda Kawar
Mr. Ramzi Kawar
- *USAID Jordan*
Mr. Jamal Al- Jabiri
- *AMIR Program*
Mr. Stephen Wade, Program Director
Dr. Zaki Ayoubi, Component Leader, Business Associations
Mr. Larry Milner, AMIR Consultant
Ms. Sameera Qadoura, Training Coordinator

Public Policy Advocacy Seminar

December 10, 1998

Marriott Hotel

Amman, Jordan

**“The Role of Business Associations in
Policy Advocacy and Analysis”
Workshop**

Thursday, December 10, 1998
09:00 a.m. - 12:00 p.m.
Marriott Hotel - Amman

AGENDA

08:30-09:00 Registration and Refreshments

09:00-09:15 Opening Remarks
- Mr. Stephen Wade
- Dr. Zaki Ayoubi

Director, AMIR Program
Component Leader,
Business Associations

09:15-10:15 Public Policy Advocacy

Mr. Larry Milner
AMIR Consultant

10:15-10:30 **COFFEE BREAK**

10:30-11:15 Issue Analysis

11:15-12:00 Group Discussion





Lesson Plan

PUBLIC POLICY ADVOCACY ***(PPA)***

LESSON PLAN

Instructor: _____

Time Allotted:

Course Objectives:

Participants will:

1. Understand how policy is made in a democratic society and the importance of public policy advocacy
2. Discuss the steps to developing a business advocacy program
3. Understand strategies to influence public policy
4. Understand how to develop policy positions and communicate those positions to members, lawmakers, allies and **the** general public
5. Understand the importance of tracking legislation and follow-up
6. Understand the elements of a strong public policy advocacy program

| Time | Tasks | Ref. | Methods/Notes |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|---------------|
| | b. Members want it more and more c. Members will be affected anyway d. Good public policy stimulates economic growth | | |
| | C. Creating Representatives out of Politicians 1. Equal pressures from all sides 2. In unity there is strength | Manual p. 2 OVHD #6 | |
| | D. How Policy is Made - Points of Influence 1. Laws and Regulations: <ul style="list-style-type: none"> - are created by policymakers decision (Legislative Action Groups) - who are elected by voters (Political Education) - who are influenced by the issues (Grassroots Network) - that are determined by economic and political perceptions (Business Education) - which are developed as a result of various levels of knowledge as communicated by Business Associations (Business Education) 2. Changing or influencing levels of knowledge can change entire development process | Manual 3-4 OVHD #7,8 | |
| | E. Obstacles to Development of Effective Public Decisions 1. Ignorance on the part of: <ul style="list-style-type: none"> a. Business b. Government Leaders c. Various Publics 2. Wrong Perceptions - proposals effect | Manual p. 5 OVHD #9 | |

| Time | Tasks | Ref. | Methods/Notes |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|---------------|
| | <p>government officials</p> <p>6. Provide guidance to members and others on how to act and address legislators</p> <p>7. Provide legal vehicle for "lobbying" specific government leaders</p> <p>8. Provide knowledge of people, procedures, structures</p> | | |
| | <p>H. What governments should expect from business associations</p> <p>1. Legitimacy - tell them who you are</p> <p>2. Honest presentation of facts based on good research</p> <p>3. Careful, selflessly developed positions</p> <p>4. Respect for confidences</p> <p>5. Responsible participation</p> <p>6. Sensitivity to political matters</p> | <p>Manual p. 8 OVHD #13</p> | |
| | <p>L What business associations should expect from government</p> <p>1. Stability in policies</p> <p>2. Reasonable regulations</p> <p>3. Effective performance</p> <p>4. Access/response</p> <p>5. Willingness to decide</p> <p>6. Respect for confidences</p> <p>7. Information</p> | <p>Manual p. 8 OVHD #14</p> | |

| Time | Tasks | Ref. | Methods/Notes |
|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|----------------------|
| | 8. Opportunity to participate or help 9. Cooperation 10. Treated as organized voice of business community | | |
| | J. Strategy to Influence Public Policy 1. Develop policy positions 2. Educate members 3. Mobilize grassroots networks 4. Lobby lawmakers 5. Build coalitions 6. Build public support for your new policy position 7. Track legislation 8. Follow-up 9. Clearly define process and make sure all involved understand and support the process | Manual p. 9 OVHD #15 | |
| | K. Developing Policy Positions 1. Government Relations Committee - Empowered by the Board - Positions are later approved by Board - Optimum size is 20 people - Meets frequently - Uses a subcommittee structure to research, analyze and make recommendations a. Brainstorms all issues b. Reviews "hot" issues | Manual p. 10 OVHD #16 Manual p. 11 OVHD #17 | |

| Time | Tasks | Ref. | Methods/Notes |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|---------------|
| | c. Sets priorities | | |
| | <p>2. Membership Input</p> <p>a. Via surveys, input meetings,</p> <p>b. Tests priorities/positions</p> <p>c. Determine if committee is on track</p> <p>d. Looks for new items</p> <p>3. Staff Evaluation</p> <p>a. Do issues affect broad based of members?</p> <p>b. Will it see action this year?</p> <p>c. Can we have an impact?</p> <p>4. Establish policy positions</p> <p>a. Research and analyze subject</p> <p>b. Use member and outside expertise</p> <p>c. Assign subjects to committee for more analysis</p> <p>d. Should by issue by issue, not bill by bill</p> <p>e. Should be broad and flexible</p> | <p>See National Business Agenda 1995-1996 Membership Survey</p> <p>See Virginia Chamber of commerce Policy Positions</p> | |
| | <p>f. Should grant emergency discretionary authority</p> <p>g. Should be prepared in advance of need</p> <p>h. Should assign authority for</p> | | |

| Time | Tasks | Ref. | Methods/Notes |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|---------------|
| | <p>implementation</p> <p>5. Review by Government Relations committee</p> <p>6. Board Review</p> <p>7. Draft of policy submitted to members</p> <p>8. Final draft submitted to members</p> <p>9. Adopt policy for specific period of time</p> <p>10. In English speaking countries explain KISS rule - Keep It Short and Simple or Keep It Short Stupid!</p> <p>NOTE: Very important that all organizations have a written process for development of policy positions</p> | | |
| | <p>L. Educate members - The Next Step Beginning to build public support for your new policy position</p> <p>1. Publications, newsletters, updates</p> <p>2. Seminars, Workshops</p> <p>3. Social Events</p> <p>Educate members so that they can educate others!</p> | <p>Manual p. 12 OVHD #18 See Issue Update</p> | |
| | <p>M. Mobilize grassroots networks</p> <p>1. What is a grassroots network?</p> <p>a. Fundamental level of organized participation in a democratic society</p> <p>b. Citizens united around common goals, hopes or fears</p> | <p>Manual p. 12 OVHD #19 See Action Call</p> | |

| Time | Tasks | Ref. | Methods/Notes |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|---------------|
| | Use handout the Ten Commandments of Legislative Advocacy | Manual p.15 OVHD #23 | |
| | O. Building Coalitions - Looking for allies 1. See who else is on your side and where do they fit in the effort 2. Common failure is associations do not cooperate 3. Cooperation in research as well as lobbying 4. How to build them: a. Identify allies and opponents b. Build constituency and recruit allies c. Select leadership from within allies d. Devise a plan of action e. Determine resources and budget f. Divide up tasks g. Set up a working task force | Manual p. 16 OVHD #24 | |
| | P. Track legislation 1. Create a standard tracking format 2. Share this with members | Manual p. 16 OVHD #25 | |
| | Q. Follow-up Track and publicize voting records 2. Write thank you letters to legislators and active members 3. Analyze the effectiveness or weakness of lobbying | Manual p. 16 OVHD #26 | |

| Time | Tasks | Ref. | Methods/Notes |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|---------------|
| | 4. Track and communicate contribution source of elected officials | | |
| | R Strong vs. Weak Programs 1. Readability and regularity of information 2. Conciseness of information 3. Feasible targets 4. Influence policy prior to decision 5. Identifying <i>emerging</i> issues 6. Motivation of members 7. Recognition | Manual p. 17 OVHD #27 | |
| | Q. Example of a public policy advocacy program Instructor can give example of a public policy advocacy program (Syracuse overheads and materials provided) | Manual p. 18 OVHD #28-31 | |
| | R Case Studies See what projects other organizations have implemented to influence policy decisions | Manual p. 19-24 | |

MATERIALS TO BE USED (MATERIALS WILL BE INDICATED WITH AN "X" SINCE NOT ALL MATERIALS ARE USED IN ALL COUNTRIES):

"The Policy Making Process, Role and Responsibilities of Committees, Committee Chairpersons, Board," U.S. Chamber of Commerce

"Building the National Business Agenda: Summary of Emerging Issues," *August* 1994, U.S. Chamber of Commerce

"The 1993-1994 National Business Agenda, U.S. Chamber of Commerce Federation," U.S. Chamber of Commerce

"1992 State Legislative **Proposals**" for Consideration by the 1992 Virginia General Assembly," presented jointly by the Hampton Roads Chamber of Commerce and Virginia Peninsula Chamber of Commerce

X "The Virginia Chamber of Commerce Public Policy Positions, 1993-1994"

"Building the National Business Agenda," Report of the **Atlanta**, Georgia Regional Action Forum, October 31, 1992

X "Building the National Business Agenda, 1995-1996 Business Ballot," U.S. Chamber of Commerce

X *GAIN* Action Call, U.S. Chamber of Commerce

X *GAIN* Issue Update, U.S. Chamber of Commerce

"A Guide to Communicating with Members of Congress," *GAIN*, U.S. Chamber of Commerce

"National Business Agenda Report," October 1993

X "**Association** Government Relations: A Real World Overview," by David **Stauffer** U.S. Chamber of Commerce, 1988

"Principles of Association Management," American **Society** of Association Executives, 1988, Chapter 10

(X) "Legislative **Advisory** Services Improve Decision **Making**," Economic Reform Today, Special Repint, CIPE

(X) "Empowering Members to Work with Lawmakers," Association Management, February 1994

*Following is the complete grant used for the case study and its evaluation for background information only.
Participants have an abbreviated version of the grant in the manuals.*

BOLIVIA

Gonzalo Sanchez de Lozada, former planning minister responsible for initiating Bolivia's stabilization and structural reform programs in the **mid-1980s**, won the presidency of Bolivia in June 1993 by a wide margin. While Bolivia's market reform program produced dramatic macroeconomic results that have *earned* it the respect of international financial **institutions**, it has not brought prosperity or tangible improvements to a large segment of the population. In response to public resistance to opening the economy, the previous Paz Zamora administration began to slow the reform process.

A number of reforms required to complete Bolivia's transition to a market economy and advance national development within a system that guarantees political and economic liberties **will** come up for discussion in Parliament. President Sanchez de Lozada **will need** business and public support to continue and deepen the economic reforms and social programs. Through its Congressional Analysis and Follow-up Program (UASPA) the Confederation of Bolivian Businessmen intends to press for fundamental changes that will address these priorities and support the economic and democratic reforms essential to consolidate the gains made to date in Bolivia.

GRANTEE: Confederation of Bolivian Businessmen (CEPB)
La Paz, Bolivia

TITLE: Congressional Analysis and Follow-up Program

DATES: May , 1994 - April 30, 1995

OBJECTIVES:

To contribute to the consolidation of Bolivia's market economy and the construction of a new democratic society by **deepening the** involvement of the private sector in public policy decision making within the legislative and executive branches.

To overcome some of the legal and administrative barriers to the development of private sector activity.

* To improve **services** to its affiliates by providing them with economic analysis and information to **assist** them in their policy advocacy efforts.

ACTIVITIES:

Analysis and formulation of laws

UASPA will conduct economic and legal analyses of at least 12 legislative proposals most relevant to private sector activities, including **already** existing laws. Upon the request of the CEPB's affiliate, UASPA plans to draft and **introduce** at least two legislative bills. These bills will be complemented by comprehensive legal analyses.

UASPA will tie the development of the overall program to the legislative agenda. The anticipated legislative agenda for 1994-1995 includes:

structural reforms of the state (capitalization of public **services**, pension **fund**, constitutional, decentralization, judicial branch modernization, education, health care);

laws to improve economic performance (decentralization, exports, national budget, capital markets, antitrust, labor laws, forestry, water, private universities);

strengthening democratic institutions (reform of congressional debate laws, political party reform, ombudsman legislation, **rural** communities, popular participation).

* **Informational bulletin, *UASPA Informs***

UASPA will continue to publish *UASPA Informs*. Each of the monthly bulletins will be sent to 1,000 legislators, government officials, private sector leaders and **organizations**, state-owned enterprises, political **parties**, labor unions, the media, the Catholic Church and universities. Each bulletin will have the following format:

Analyses and Recommendations. This **section** will briefly discuss the **costs** and benefits of one or more legislative proposals.

Interview. Congressmen will offer their comments regarding the legislation under consideration

Economic Situation and Economic Indicators. These **sections** will update statistics on inflation, exchange **rates**, international prices, interest rates and include explanations for significant changes

* **Legislative analysis bulletin**

UASPA will publish **three** *Legislative Projects* bulletins devoted to a more in-depth review of the economic and legal implications of draft laws analyzed by its staff. Each of **the** issues will be distributed to **400** legislators, government ministries, CEPB's **affiliated** associations, the media and research institutes.

* **Advocacy and outreach activities**

Meetings with Parliamentarians. UASPA staff will hold regular **working** meetings with members of Parliament approximately **once** every two months. UASPA staff **will** also introduce its program to new legislators and offer its support in the analysis of proposals.

Regional Meetings. UASPA staff will meet with the CEPB's **affiliated** federations to identify private sector priorities, participate in seminars, or assist with economic analyses.

Seminars. **Staff** will hold two **seminars** on key **bills** of interest to the private sector, and the proceedings will be distributed to policy makers, **political party** leadership, and academic **institutions**

Press coverage. UASPA will encourage press and media coverage of its analyses and recommendations.

*** Documentation Center and Database systems**

UASPA will continue to expand and **update** its **databases** (macroeconomic statistics, legislative tracking, congressional members); establish **a** documentation center of economic information that links the CEPB with its **affiliates** and other research centers; and catalogue its library reference materials.

STATUS: Active.

The following report for the **period** November **1994** - January **1995** covers the CEPB's third quarter of activity under its third CIPE grant. During the quarter UASPA developed the following activities:

o **Informational bulletin, UASPA *Informes*** -- **Three** bulletins were published during this period which analyzed the most important issues under consideration by the legislature.

Number 6 *Tax Reform Law*

This bulletin provides an analysis of the Tax Reform Law and presents the CEPB's position regarding the bill. The bulletin was widely circulated through the media.

Number 7 *Economic Performance of Bolivia*

This bulletin offers an analysis of the positive and negative *aspects* of the performance of the Bolivian economy during 1994.

Number 8 *Telecommunications Bill*

This bulletin includes an analysis of the Telecommunications **Bill**.

o Analysis and formulation of laws

The CEPB **also carried** out a number of additional economic **studies** on the following topics:

- Private Investment
- Month-to-month updated information on economic performance
- **Tax** Pressure
- Background Information on the **tax** issue
- Chronology of agreements between the **IMF** and the Bolivian government
- Employment

o Advocacy and outreach activities

UASPA continued its advocacy and outreach efforts through its **participation** in **policy** discussions **with** government officials and coordination with other organizations and officials, including **meetings** **with** Senator Richter, Congressman **Zamora**, the **Technical** Office of the Budget **of** the National Congress, the Commission of Science and Technology, and the **IDB** mission in Bolivia.

o Seminars and Forums

UASPA participated and/or organized the following **seminars** and forums:

| <u>Date</u> | <u>Topic</u> | <u>Sponsor</u> |
|-------------|------------------------------------------------------------------|-----------------------------------------|
| 11/14 | Telecommunications Bill | CEPB |
| 11/21 | Development of Comparative Advantages | Economic Development Ministry |
| 11/30 | Economic Development | Bolivian Catholic University |
| 11/30 | Private Entrepreneurship Congress | CEPB |
| 12/01 | General Plan for Social & Economic Development | “Milenio” Foundation |
| 12/01 | Telecommunications Bill | Mayor of La Paz |
| 12/09 | In Search of a New Paradigm | FUNDEMOS |
| 12/14 | Strategy for International Investment | Economic Development Ministry |
| 12/16 | Presentation of the Results of Regional Data Bases | National Institute of Statistics |
| 01/20 | Development Projects for La Paz | Ministry of the Presidency |

o Documentation Center and Database Systems

Staff continued **to** update the **databases on** macroeconomic statistics and congressional activities

PHILIPPINES

Since the 1992 elections, the administration of President Fidel Ramos has **been successful** in continuing and accelerating the economic reform process begun under Corazon Aquino. **Still**, greater economic progress will **be necessary** for the Philippines to consolidate the democratic gains created by the People Power revolution in 1986 that brought Aquino to power. Further reforms will **also** be needed to help the Philippines compete with its economically dynamic neighbors in **ASEAN**.

The recent **restoration** of democratic institutions in the **Philippines** has helped **shift** the economic debate away from the traditional and inward-looking import-substitution model toward market liberalization and globalization. Nevertheless, although protectionist and other vested interests that are hostile to economic reform have lost considerable credibility in recent **years**, they remain active in attempting to manipulate the democratic process to block or impede reform efforts. **Thus**, strong and vocal advocacy efforts in support of economic liberalization are essential in shaping the public policy debate and building a national consensus in favor of reform. CIPE's strategy is to support programs to help restructure the economy along market lines by mobilizing the **small** business community, journalists and others to play a strong role in the public policy process.

GRANTEE. *Philippine Chamber of Commerce and Industry (PCCI)*
Manila, Philippines

TITLE: Business Advocacy Program

DATES: August 1, 1992 - April 30, 1994

OBJECTIVES:

To develop public understanding and support for the economic stabilization program being advocated by PCCI.

- To improve private sector participation in **policy** formulation.

To influence policymakers and public opinion on economic issues in order to contribute to the country's economic development.

ACTIVITIES:

There are four major project activities. In the first stage, PCCI's voluntary leaders and executive staff members, who will spearhead the **advocacy** campaign, will undergo **training on** advocacy techniques. The workshop will **be** taught by CIPE **consultants** in Manila. **This** will be followed by the establishment of the Policy Research Unit at PCCI to undertake a Legislative Advisory Program. **This** unit will research and produce PCCI's position papers on economic reform issues in the Philippine Business Conference paper. **These** position papers will be distributed to Congress and followed up with a personal, an institutional, and a media campaign. **The** media advocacy campaign will include television and radio **spots as well as** quarterly one-page advertisements.

Specific steps in the work program are **as follows**:

Train **25** PCCI voluntary leaders and executive staff **as** effective spokesmen of business. Training **be** conducted by trainers identified **by** CIPE. A **three-day** training **seminar** is planned, emphasizing the advocacy of the **PBC** paper and **focusing** on leadership training, public speaking, advocacy techniques, the **U.S.** Chamber of Commerce's Congressional Action Network and organizing legislative action **committees**. The voluntary leaders and **staff** of PCCI will then meet with their counterparts in provincial chambers of commerce advocacy committees to brief them on the issues **and** explain to them how the advocacy network will **operate**.

2. The Legislative and National Issues Committee of **PCCI will be** responsible for identifying the issues requiring action by the network. **The** two committees **will** meet regularly to identify issues and initiate policy proposals in the form of proposed legislation.
- 3 **Start** a Legislative Advisory Program by **setting** up a Policy Research Unit in PCCI **to** analyze bills with a direct impact on the private sector. **These will be** highlighted with respect **to** the **stabilization** measures advocated in the Philippine Business Conference paper. Twelve reports **will be** distributed to members of Congress, business associations, labor, media **and** the government. **Bills** will be tracked to **see** which of PCCI's recommendations have been accepted into final legislation. **This w** **also** include preparation of **bills as** needed to Congress through a sponsor identified by **PCCI**.
4. The distribution of each analysis **will be** followed up with meetings between PCCI representatives **and** **the** technical staff of Representatives and Senators. **These** representational meetings will combine **the** personal and institutional approaches to advocacy and are designed to discuss issues in detail and **emphasize PCCI's** point of view.
- 5 **A** Communications **Program will be started** to build public understanding of PCCI's position. A regular syndicated column will be arranged with **three** national newspapers to be published once **a week** entitled "Voice of Philippine Business." Every quarter, PCCI will issue a full-page supplement in the dailies reporting on major achievements with respect to the Philippine Business Conference agenda.
6. **A** 30- minute TV program **to be** simulcast on radio once **a** month. **This will be** a forum for debating current economic reform issues by a panel of national **political**, business **and** academic figures. It is **to be** implemented in conjunction with existing programs such **as** "Viewpoint."

STATUS: Project completed. Final report follows.

Actual Activities

1. PCCI Business Advocacy Workshop was held from October 8-10, 1992, in Manila for **25** staff members of local Philippine chambers of commerce and voluntary business leaders.
- 2 PCCI-sponsored briefings on issues and on how the advocacy process works
- 3 Establishment of a PCCI Legislative Advisory Program
- 4, Meetings between PCCI officials and congressional staffers.
5. Publications ("Chamber's Views") on a variety of issues distributed by mail to legislators, key government officials and media, and 12 monthly television programs ("Business Views").

Actual Results/Accomplishments

Between September 1992 and the conclusion of the project in July 1994, the Ramos administration implemented a long list of economic reforms. Through **this** project, PCCI played a major role in influencing public opinion on key policy issues and strengthened its advocacy and communications capabilities.

Among the reforms implemented in which PCCI was involved were the creation of the Central Monetary Authority, the liberalization of the Foreign Banking Law, and alternative revenue measures to the oil levy. In addition, significant progress was made on some other issues that will enhance the likelihood of future implementation, including antitrust laws, creation of an Export Development Council, and further reduction of tariffs under the ASEAN **Free** Trade Area.

Overall Evaluation

While the impact of advocacy projects is difficult to quantify, PCCI by **all** accounts was a leading advocate of economic reform during the project period, and a leading player in the advocacy process. For example, PCCI officials were called on to participate in a number of committees deliberating on policy issues such as the Oversight Committee of the Local Government Code, Energy Coordinating Council, Monetary Board and Regional Development Councils.

PCCI's Policy Research Unit, supported by **CIPE**, worked closely with professional staff of the House and Senate, regularly providing them with information and position papers on proposed legislation. In some **cases**, PCCI staff and a consultant funded through the project actually drafted the text of legislation that was incorporated **into** final version of **bills**.

The "Chamber Views" issue papers were professionally produced and widely distributed among key decision-makers in Manila. PCCI's "Business Views" monthly programs were broadcast during the 10:45-11:45 p.m. timeslot on **weeknights**, and attained a 19 percent audience share. Some of the topics covered in the issue papers were also discussed in the television programs to help reinforce the positions taken by PCCI.

In addition, following PCCI's Business Advocacy Workshop, local chamber officials initiated their own advocacy programs by conducting workshops on the local government code, employing print and broadcast media to communicate their positions on local issues.

Finally, the Multi-Sectoral Conferences initiated by PCCI in cooperation with various government agencies and attended by President Ramos were effective in building consensus and facilitating policy decisions.

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Overall, the project **was** successful in expanding public understanding **and** support for economic reforms, influencing the **pace and direction** of specific reforms, **and** enhancing private-sector participation in the policy process. CIPE's recent advocacy programs with PCCI **and** CRC have contributed to the institutionalization of the advocacy process in the Philippines, **a** process that now may **be strong** enough to continue without further CIPE support.

GHANA

The government of Flight Lieutenant (Ret.) J.J. Rawlings has been in power since 1981 as an authoritarian regime and, more recently, as an elected government. On November 3, 1992, presidential elections were held in Ghana, with Rawlings Winning 58% of the vote. Parliamentary elections went forward as planned on December 29, 1992, but opposition parties boycotted this round, meaning that Rawlings' party and its allies assumed control of both the executive and legislative branches of government upon inauguration.

Since 1983, under pressure from the IMF and the World Bank, Rawlings has been introducing market-oriented economic reforms. The country's prices have stabilized, exports have increased, and privatization has proceeded apace, with real growth hovering around 5% per year. Despite these improvements, which have been some of the most successful in Africa, Ghana's economic and democratic transformation is still incomplete.

GRANTEE: Institute of Economic Affairs (IEA)
Accra, Ghana

TITLE: Legislative Advisory Service

DATES: May 1994 - September 1995

OBJECTIVES:

The overall objective of the project is to assist Ghanaian policy-makers in identifying key institutional (legal and administrative) impediments and correcting those deficiencies through institutional reforms that promote more effective functioning of markets and sustainable economic growth.

Specifically, the objectives of the project are:

- To encourage the government's policy of repealing restrictive and unproductive laws by providing economic information, assessments of various laws and the economy's state of health, and economic forecasts;
- To inform lawmakers and the public of the consequences of economic laws and regulations the lawmakers enact, thereby creating accountability and broadening the decision-making process;
- To alert policy makers and provide analysis on economic laws and advocate specific legislative actions that will encourage the growth of a market economy in Ghana; and
- To improve the decision-making ability of law-makers in writing economic laws.

By reaching the parliamentarians themselves, as well as spokespersons of the community -- such as journalists, church leaders, and indigenous chiefs -- the IEA expects to be able to educate the population and develop consensus in support of market-oriented reforms. This support will be critical to efforts to lobby for the repeal or modification of laws.

ACTIVITIES:

1 Select legislation to analyze

The Institute will work with its Board of Directors to carefully select legislation to consider. The Board will set up the guidelines to use for selecting the laws in order to ensure fair treatment. Initially, the Institute will select unpopular laws that have high probabilities of being changed. Some are:

- Business Registration Laws
- * Import Restriction Laws
- * Exchange Rate Regulations
- * Privatization Laws
- * Foreign Investment Laws
- * Banking Laws

2. Analyze legislation and disseminate reports

The Institute will produce twelve reports per year, at the rate of one per month.

A total of **1,800** of these reports will be distributed as follows:

| | |
|----------------------------------------------------------------|-------|
| Head of State and Members of the President's Office | 50 |
| Cabinet Members and Permanent Secretaries | 150 |
| Members of the regional Houses of Chiefs | 100 |
| Professors at Cape Coast University | 50 |
| Professors at University of Science & Technology | 50 |
| Professors at University of Ghana, Legon | 100 |
| Church Leaders | 100 |
| Judges & Members of the Judiciary | 100 |
| Labor Unions/ Women's Organizations | 150 |
| Members of the Chamber of Commerce | 200 |
| Members of the Associations of Ghana Industries | 150 |
| Members of Small Business Association | 50 |
| Executive members of all political parties | 100 |
| Executive members of regional assemblies | 100 |
| Members of Parliament | 200 |
| Journalists/Major Newspapers | 50 |
| Members of the Diplomatic Community | 100 |
| Total | 1,800 |

3 Mid-Day Business Meetings for Private Sector Leaders

A mid-day business meeting **will** be held every month for 30 business leaders, during which the legislative report for that month will be the subject of discussion. These meetings **will** provide both policy-makers and the private **sector** the opportunity to comment **on** the suitability of the analysis to real world business concerns. They will also broaden the base of support by bringing the debate into public domain.

4 Consultation

The Institute's **staff** members will both make themselves accessible for consultation and actively pursue meetings with policy makers (Secretaries and members of Parliament) regardless of political **affiliation**. Discussions with the business community and policy-makers **will** enhance the credibility of the reports, **as** the sensitivities of these groups are taken into consideration when the reports are written.

5 Round-table Debates

The Institute **will** organize six bimonthly round-table debates each year **for** business leaders, tribal chiefs, policy makers and professors to discuss the costs and benefits of a particular legislation, and if possible lobby for changes in the law. These meetings **will** provide an opportunity **for** 30 business leaders, policy makers and government representatives to comment on the suitability of the legislative analysis to **actual** business concerns. In some cases, following the publication of a particular issue and the response **from** the public, **IEA** would invite prominent members of the business community and other distinguished public leaders to meet with policy makers at its roundtable debates to directly lobby for a change in the law.

6 Monthly Seminars for Parliamentarians

The Institute will organize monthly seminars for **20** parliamentarians to explain the costs and benefits of economic laws to society, discuss the substance of the reports, and to permit feedback **on** how to improve the reports. These small **seminars** will focus **on** educating them in the areas of privatization, the effect of price controls, foreign exchange rate controls and other difficult issues pending in Parliament.

IEA **will** encourage journalists to cover the above events and will be encouraged to reprint excerpts and graphs from the reports in newspapers and other publications, to expose a wider public readership to the issues involved in economic **reform** and democratic governance.

STATUS: Active.

During the November **1994** - January **1995** period, the third quarter of **IEA**'s second grant, it conducted the following activities:

| Type of Event | Topic/Title | Speaker/Author | No. Participants |
|-------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|------------------|
| Business Meetings | State of the Ghanaian Economy | | 16 |
| Consultations | see <i>discussion, below</i> | | |
| Roundtable Discussions | i. Mid-Year Review of the Ghanaian Economy | Mr. Kwesi Anyemedu | 35 |
| | ii. Budget • 1995 Issues & Expectations | Mr. Kwesi Anyemedu | 40 |
| | Private Broadcasting in Ghana | Mrs. Mary Obeng | 32 |
| Seminars | | | |
| Publications | | | |
| Press Conference | Is Ghana's ERP in Danger of Collapsing | Dr. George Ayittey | 27 |
| Press Coverage | <i>Newspaper</i> : Daily Graphic, Ghanaian Times, Financial Guardian, Business & Financial Times, National Courier, Weekly Horizon, Statesman, Christian Science Monitor, Development Business | | 11 articles |
| | Television: GBC | | 3 appearances |
| | Radio: GBC, VOA, Monitor radio | | 6 broadcasts |

The Round Table Debates and Seminars generated significant press coverage, with a total of 11 articles appearing in print media, three television appearances, and six radio broadcasts. The consultations that IEA conducted during the November-January period included presentations or interaction with: Ghana National Chamber of Commerce (GNCC) Forum; Talking Point television program on the Ghanaian economy; Mr. Ismael Yamson, President, and Mr. Alex Awuku, Executive Director, GNCC; Professor George Ayittey, American University; Mr. Pierre Sane, President, Amnesty International; **Mr. Kwesi Anyemedu**, Dept. of Economics, University of Ghana; Mrs. Mary Obeng, Ghana Civil Aviation Authority; Hon. Dr. S.B. Arthur, Second Deputy Speaker of Parliament; H.E. K.N. Arkaah, Vice President of Ghana; Dr. Hilla Limann, former President of Ghana and leader of Peoples' National Convention; Justice J.N.K. Taylor, retired Supreme Court Judge; Justice Kingsley-Nyinah, former Electoral Commissioner; **Mr. Lee Ocran**, Ghana Bottling Co.; Mr. Oscar Jost, United Trading Co.; Mr. Sadikou Alou, Mr. S.A. Ogunleye, and **Mr. W. Johnson**, GERDDES; **Mr. Julius Johnson**, NDI; Mr. Akoto Ampaw, Lawyer; Alhaji Banda, Chairman, and Mr. Vincent Bulla, Peoples' Convention Party; Mr. John Pell, Development Research Network; Mr. J.H. Owusu-Acheampong, Minister for Parliamentary Affairs; **Mr. Ernest Thompson**, television host; **Mr. George Crensil**, GBC; Hon. Dr. Owusu-Agekum, Member of

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Parliament and Minority Leader; Hon. Dr. Ibn Chambas, Dep. Minister for Foreign Affairs; Hon. Austin Gamey, member of Parliament; Hon. S. Nuamuh-Donkor, Member of Parliament and Dep. Minority Leader; Hon. E. Baah Danquah, Member of Parliament; and numerous journalists.

In early April, IEA requested an extension to its project through September 1995, to **allow** it to complete the project. To date, it has **only** completed two of **six** legislative alerts, in part because policies and bills are emanating from the executive branch of government and not the legislative branch, and in part because parliamentarians have put much demand on IEA to host roundtables to evaluate these executive branch initiatives. A no-cost extension through September 1995 will **allow** IEA to complete the entire program.

Overheads

PUBLIC POLICY ADVOCACY

Course Objectives:

Participants will:

1. Understand how policy is made in a democratic society and the importance of public policy advocacy
2. Discuss the steps to developing a business advocacy program,
3. Understand strategies to influence public policy
4. Understand how to develop policy positions and communicate those positions to members, lawmakers, allies and the general public
5. Understand the importance of tracking legislation and follow-up
6. Understand the elements of a strong public policy advocacy program

WHAT IS A PUBLIC POLICY ADVOCACY PROGRAM?

An organized ~~system~~ at local, provincial and national government levels to effectively influence policy and advocate the views of members by making those positions known to legislators.

WHY IS AN ADVOCACY PROGRAM IMPORTANT?

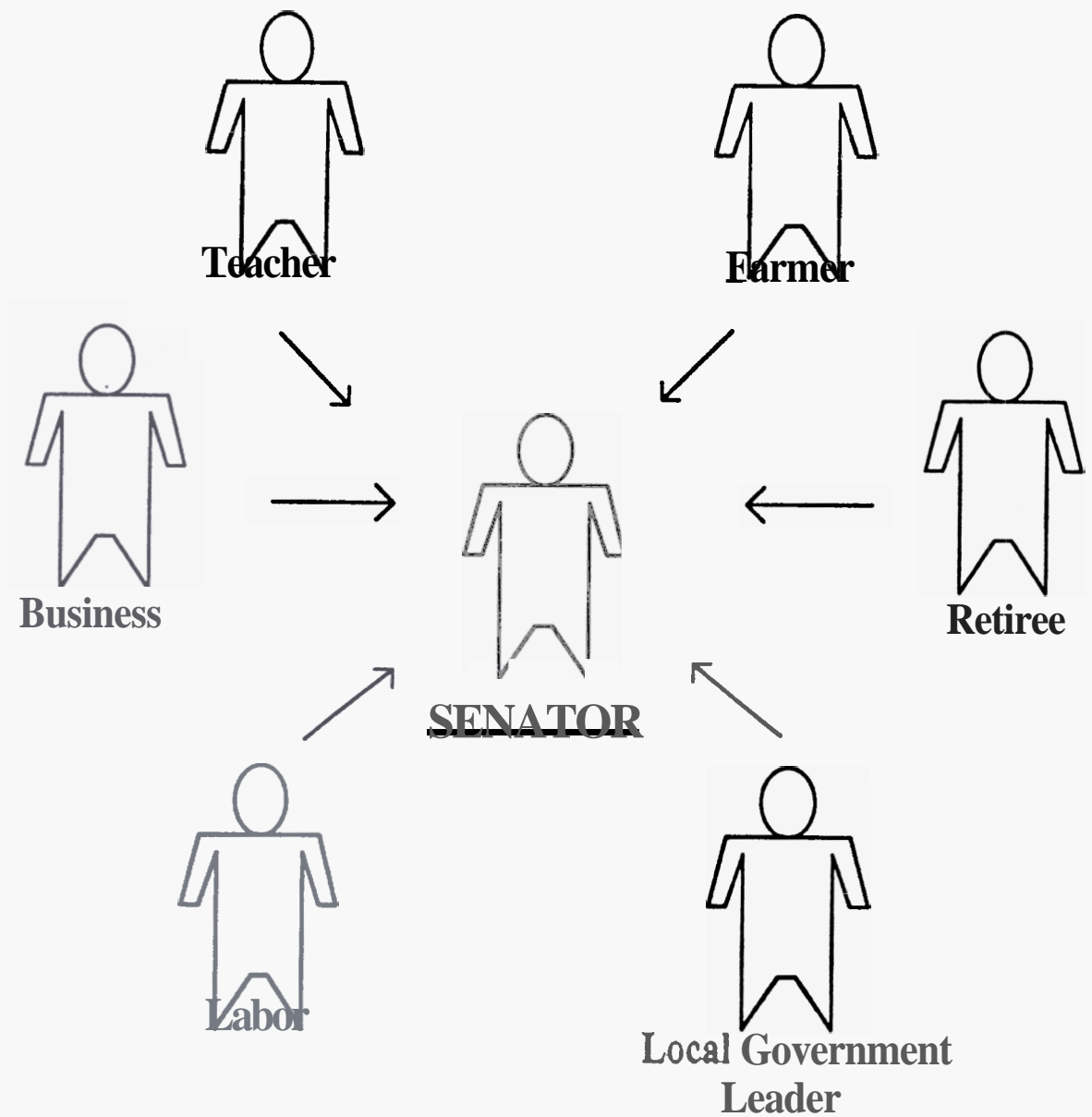
- **TO STIMULATE ECONOMIC GROWTH**
- **TO FOSTER JOB DEVELOPMENT**
- **TO DEVELOP AN ECONOMIC ENVIRONMENT THAT WILL FOSTER ENTREPRENEURSHIP**
- **TO ENCOURAGE INVESTMENT**
- **TO EQUIP MEMBERSHIP WITH INFORMATION AND MOTIVATION**



What is the business association's role in advocacy?

- 1. You need to achieve your program of work**
- 2. Members want it more and more**
- 3. Members will be affected anyway**
- 4. Good public policy stimulates economic growth**

CREATING REPRESENTATIVES OUT OF POLITICIANS





OBSTACLES TO DEVELOPMENT OF EFFECTIVE PUBLIC DECISIONS

- * IGNORANCE ON THE PART OF:**

- * BUSINESS**
 - * GOVERNMENT LEADERS**
 - * VARIOUS PUBLICS**
- 

- * WRONG PERCEPTIONS**

- * INCORRECT MARKETING OF THE
PUBLIC INTEREST**

OPPORTUNITIES FOR INVOLVEMENT

*** GOVERNMENT LEVELS**

**LOCAL
STATE/PROVINCE
NATIONAL**

*** ARENAS**

- LEGISLATIVE**
- REGULATORY**
- POLITICAL**

*** ISSUES**

EXAMPLES OF LEGISLATION REVIEWED

National Budget
National Employment Programs
Tax Reform
Workmen's Compensation
Social Security Reform
Procurement and Contracting
Reform of the Central **Bank**
Free Trade Zones
Reform of Financial and Bank Legislation
Value-added **Tax**
Capital Markets
Intellectual Property Protection
Antidumping Legislation
Industrial Promotion
Consumer Protection
Export Promotion
Labor Reform
Investment Promotion
Education Reform
Creation of an Ombudsman
Port System
Judicial Reform
Health care and Insurance reform
Chamber of Commerce Legislation
Privatization
Fishing Accords
Deregulation
Economic Integration

ELEMENTS OF AN EFFECTIVE PUBLIC POLICY ADVOCACY PROGRAM

- 1. DISSEMINATE INFORMATION**
- 2. INTERPRET LAWS AND REGULATIONS**
- 3. INFLUENCE LEGISLATION**
- 4. IDENTIFY ISSUES**
- 5. PROVIDE ACCESS TO OFFICIALS**
- 6. PROVIDE GUIDANCE ON HOW TO DEAL WITH OFFICIALS**
- 7. PROVIDE LEGAL VEHICLE FOR LOBBYING**
- 8. PROVIDE KNOWLEDGE OF PEOPLE *AND* PROCEDURES**

WHAT GOVERNMENT SHOULD EXPECT FROM BUSINESS ASSOCIATIONS

- 1. Legitimacy**
- 2. Honest presentation**
- 3. Careful, selflessly developed positions**
- 4. Respect for confidences**
- 5. Responsible participation**
- 6. Sensitivity**

WHAT SHOULD BUSINESS ASSOCIATIONS EXPECT FROM GOVERNMENT

1. Stability in policies
2. Reasonable regulations
3. Effective performance
4. Access/response
5. Willingness to decide
6. Respect for confidences
7. Information
8. Opportunity to participate or help
9. Cooperation
10. Treated as organized voice of business

STRATEGY TO INFLUENCE PUBLIC POLICY

- 1. Develop policy positions**
- 2. Educate members**
- 3. Mobilize grassroots networks**
- 4. Lobby lawmakers**
- 5. Build coalitions**
- 6. Build public support for your new policy position**
- 7. Track legislation**
- 8. Follow-up**
- 9. Clearly define process and make sure all involved understand and support the process**

MOST COMMONLY USED **SOURCES** OF INFORMATION FOR LEGISLATORS IN THE UNITED STATES

IN ORDER OF PRIORITY:

- 1** Spontaneous letters from constituents
- 2** Telephone calls from constituents
- 3.** Congressional Research Service
- 4.** Articles in major daily newspapers
- 5.** Editorials in major daily newspapers
- 6.** Visits from constituents
- 7.** Articles from constituents
- 8.** Congressional Record
- 9.** Editorials in daily district newspapers
- 10** Government publications
- 11.** Orchestrated mail from constituents
- 12** Op-ed/Opinion in major daily newspapers
- 13.** Op-ed/Opinion in local daily newspapers
- 14.** Spontaneous letters from state officials
- 15.** Spontaneous letters from interest groups
- 16.** Telephone calls from friends
- 17.** Telephone calls from state opinion leaders
- 18.** Spontaneous letter from Congressional leaders
- 19.** Visits from lobbyists
- 20.** Position papers

Source: Burson Marsteller Report: Communications and Congress

LOBBY LA ——— RS

- 1 Know the legislative and administrative structure and procedures for each level of government
2. Cultivate and maintain liaison with government Staff
3. Look at issues through legislators eyes
4. Use grassroots efforts
5. Know the players - elected and appointed
6. Use members who are affected - prepare them first
7. Timing is important
8. Select proper communication tools: visits, letters, telephone calls

WHO SHOULD PARTICIPATE?

MEMBERS

MEMBER'S EMPLOYEES

SHAREHOLDERS

FAMILY MEMBERS

ALLIED ORGANIZATIONS

GENERAL PUBLIC

MOBILIZE GRASSROOTS NETWORKS

- **WHAT IS A GRASSROOTS NETWORK?**
- **FUNDAMENTAL LEVEL OF ORGANIZED PARTICIPATION IN A DEMOCRATIC SOCIETY**
- **CITIZENS UNITED AROUND COMMON GOALS, HOPES OR FEARS**
- **PEOPLE COMMITTED TO PARTICIPATE IN THE POLITICAL SYSTEM**
- **CONSTITUENTS MATTER, BUT ORGANIZED CONSTITUENTS MATTER MORE**

EDUCATE MEMBERS

* Publications, newsletters, updates

* Seminars, workshops

* Social events

**EDUCATE MEMBERS SO THAT THEY CAN
EDUCATE OTHERS!!!**

| A STRONG PROGRAM | A WEAK PROGRAM |
|-------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| 1. Publishes "readable" information on pertinent issues regularly. | 1. Issues a position paper on product liability that only a lawyer could understand once a year. |
| 2. Prepares quick, easy-to-read summaries of new law/regulations <u>before</u> the enforcement dates. | 2. Members are sent 15-page copies of total bills or referred to legislative committee for more information. |
| 3. Targets "doable" local issues that impact members' bottom line." | 3. Sets the federal budget deficit as their chamber's #1 issue for the year. |
| 4. Influence the course of legislation - helps "frame" the debate, | 4. Waits and cries "foul" after legislation is passed that will increase members' taxes 50%. |
| 5. Identifies emerging issues. | 5. Has an issues agenda for 1990 that reads exactly as it did 1975 |
| 6. Excites members to action. | 6, Generates less than 100 business/legislator contacts in the course of a year. |
| 7. Association is "invited" to speak to the issues | 7, Association is placed 49th on a 50-person waiting list to give testimony at a public hearing. |

Examples

Issue Brief

1996 National Issue Convention • The Free Market

Americans believe in rewarding effort, providing incentives for new economic ventures, and letting people get rich when they work at it. The best way to increase everyone's share is to make sure the economic pie keeps growing. Governmental actions including heavy taxation of savings and investments, tax hikes, over-regulation of business, and other policies that discourage investors and entrepreneurs—have been a serious obstacle to faster growth.

If governmental policies were changed to encourage economic growth and help businesses take advantage of recent technological advances, America should be able to achieve growth rates that rival those of the post-war period. Rapid economic growth will generate new jobs and higher wages and salaries for most Americans. The free market system, which has been notably successful in providing a high standard of living for thousands of Americans, is the most promising way to achieve higher wages and a better standard of living over the next generation.

This would mean

- Lowering taxes, especially on savings and investment. With lower taxes, existing businesses would be encouraged to step up investment, and entrepreneurs would have a greater incentive to start new ventures.
- Balancing the federal budget so government borrows less. That would make more funds available, at lower interest rates, to invest in new or expanding businesses. It would also encourage individuals to finance and purchase homes or cars.
- Reducing unnecessary regulations to permit more freedom to those building or expanding economic enterprises.

In Support

- The market-based system has provided a higher standard of living than any other economic system in history. Why tamper with success?
- Americans think about fairness in practical terms. If you stay in school and get advanced training, you deserve to earn more. It's fair for those who save and invest and work hard to make a profit.
- Without the prospect of substantial economic gains, people would have no incentive to lend money or put their time and energy in new investments that are the key to an expanding (economic) pie.

In Opposition

- Economic growth is meaningless to most Americans if family income doesn't increase as a result of economic expansion.
- It's unrealistic to promise growth rates that rival those of the post-war years. While it is desirable to take various measures to enhance economic growth, it is unlikely that the American economy can grow much faster than its current rate.
- Income inequality justified in the name of efficiency and incentives has become excessive and morally indefensible over the past two decades.
- Cutting taxes, slashing regulations, and getting government out of the way sounds appealing. But public expenditures on schools, training programs, and services to children are necessary if we're serious about making equal opportunity a reality.

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A Sample News Release

For Immediate Release

Charles LeBlanc
Seaside Chamber of Commerce
Seaside, Tierra Bonita
Phone 555-5555

SEASIDE CHAMBER FIGHTS FOR REFORM

The Seaside Chamber of Commerce announced today at its monthly board meeting that the chamber is forming a new coalition with the National Association of Building Parts Manufacturers to fight for President Adolpho Sanchez's new federal tax reform plan.

Charles LeBlanc, chairperson of the chamber board, said, "Tax reform is imperative for Tierra Bonita to remain competitive in the global economy. The businesses of our country are burdened with overtaxation that makes the costs of our products higher than competing nations' manufacturers. This new coalition, which will be called Fair Taxes for Tierra Bonita, will help the president achieve his goals."

The executive director of the National Association of Building Parts Manufacturers, Helga Schiller, said "President Sanchez has always supported tax reform, and his proposal now pending before the legislature is vital for the building parts industry of Tierra Bonita. We invite others to join this Fair Taxes for Tierra Bonita coalition."

According to a report presented to the chamber board, federal business taxes add at least five zoyas to every Tierra Bonita-made building part. The average tax in other countries is equivalent to only three zoyas. The report, produced by the staff of the Chamber from a survey of building parts makers, further states that a decrease in the federal tax rate would actually produce more tax revenues for the government in the long run. The report argues that lower taxation will cause a dramatic increase in sales of parts and systems, which will in turn produce more tax money for the national treasury.

"President Sanchez's reform proposal is equitable, broad-based and non-regressive, and fosters a favorable business climate. His approach encourages economic development," LeBlanc said.

"Taxes should be few in number and easy to administer with the tax burden distributed primarily among income, sales, and property taxes, and not based on protectionism," said Schiller.

A policy statement issued by the chamber asserts that "equilibrium should be maintained between tax growth, population growth, and economic activity."



The Society of the Plastics Industry, Inc

Issue Brief

INTERNATIONAL TRADE ISSUE OUTLOOK 1998: POSSIBLE IMPACT ON THE U.S. PLASTICS INDUSTRY

China MFN

- Issue:** The annual debate to renew China's Most-Favored-Nations (**MFN**) trade status takes place every spring. As every president has done since 1980, President Clinton is expected to recommend to Congress that China's MFN be renewed. The Congress must pass a resolution of disapproval for MFN not to continue. The House in July defeated the resolution of disapproval, which means that China will continue to receive MFN status. The issue will again be deliberated in 1999. The debate centers on congressional and public concern regarding human rights violations in China. MFN opponents believe that removing MFN, which is important to Chinese exporters, would force the Chinese government's hand to change their human rights practices. MFN supporters believe that not renewing MFN would further alienate the Chinese and may result in a trade war that would severely hurt U.S. business. In addition, supporters believe that the best way to encourage better human rights in China is to be involved through business and trade. The term "most-favored-nation" is slightly misleading. A designation as MFN simply means that the U.S. treats an MFN nation with regard to tariffs as it does every other trading partner (with the exception of former Soviet bloc countries, Cuba, and Iran, for example).
- Plastics Impact:** Not renewing MFN for China would result in U.S. tariffs on Chinese imports increasing significantly. It has been speculated that not renewing MFN would result in a trade war, hurting U.S. imports. The U.S. plastics industry, as well as other manufacturing and service interests, could be severely hurt by any Chinese sanctions on U.S. imports.
- Action:** SPI policy supports renewing MFN for China. SPI has lobbied in the past, and will in the future, for granting MFN to China. In June, SPI testified before the House Ways and Means Trade Subcommittee in support of China MFN.

China and WTO

- Issue:** One of the biggest areas of U.S. leverage over China's trade policies may be the negotiation over the terms of China's accession to the World Trade Organization. China has been lobbying to join the WTO for 10 years, and the United States, as well as some other developed nations, are concerned about some of China's positions in the negotiations thus far. The United States believes that China must reform its market access regime and its system of trading rights, where only certain designated entities are permitted to import or export goods. Other concerns are with China's limits on foreign direct investment and its implementation of a 1996 agreement on intellectual property rights.
- Plastics Impact:** Because of the U.S. plastics industry's continued interest, presence and anticipated growth in the Chinese market, it had a vested interest in the terms of Chinese accession to the WTO, particularly on issues such as market access, trading rights and intellectual property rights protection.
- Action:** SPI currently is exploring the development of a policy paper on this issue that would be used in lobbying the U.S. Trade Representative's office and Congress.



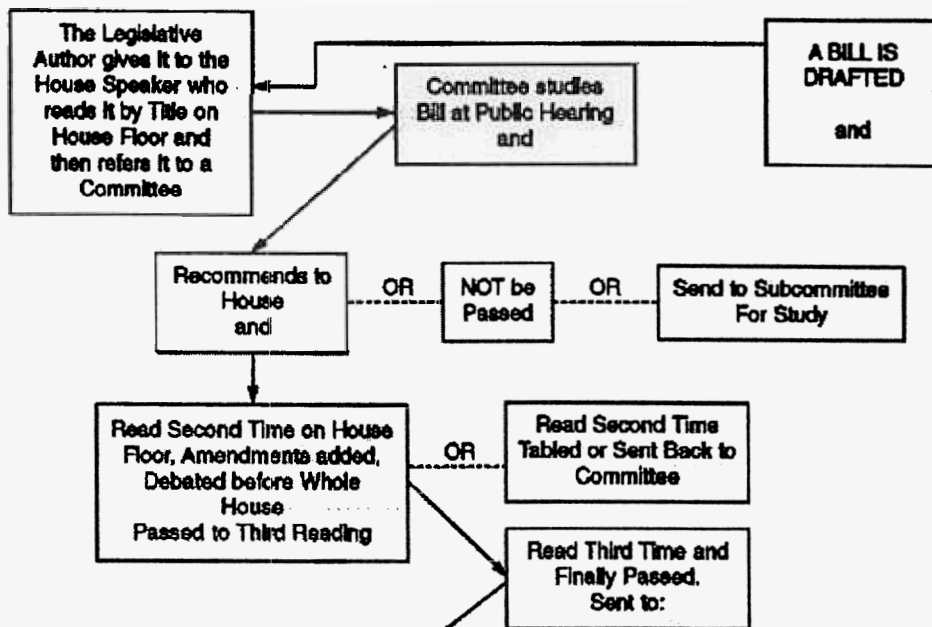
Programs

STATE MAP

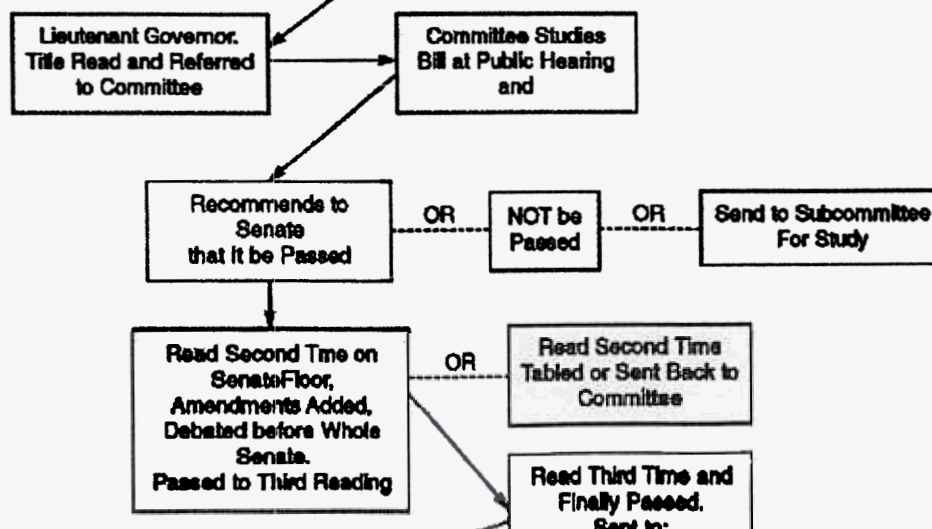
GOVERNMENTAL RELATIONS

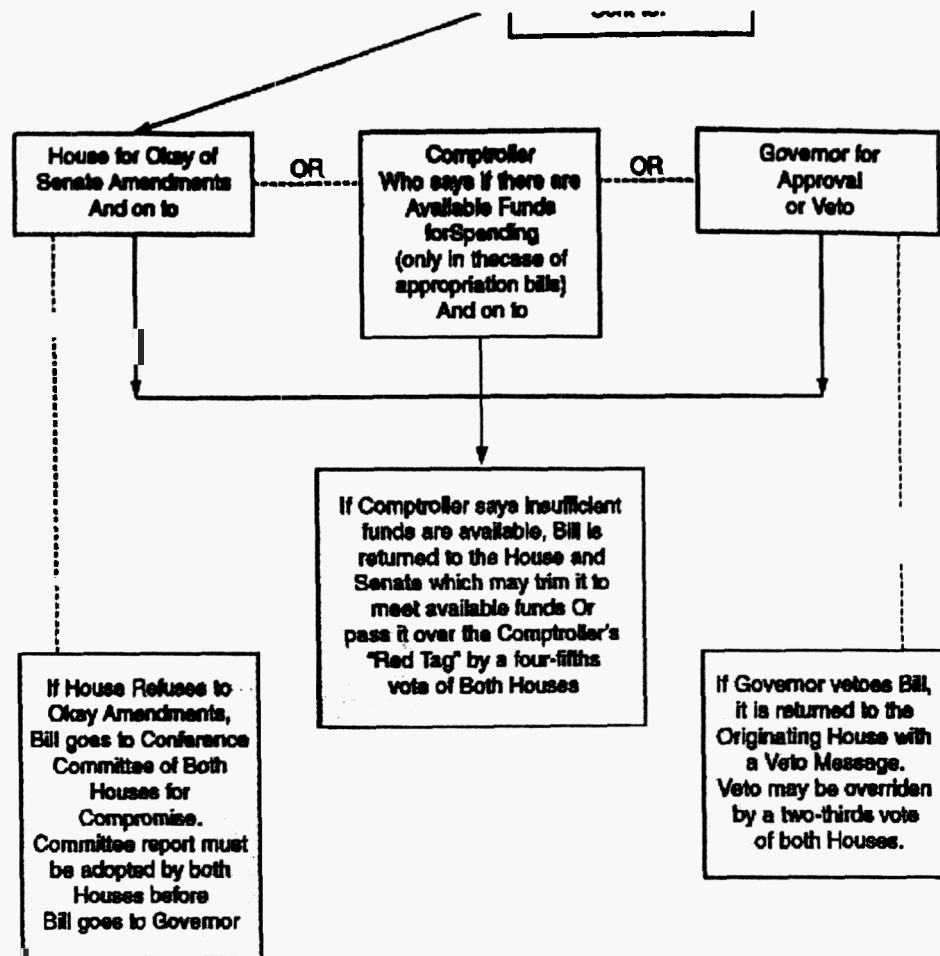
How A Bill Becomes A Law

HOUSE



SENATE





The diagram represents a bill originating in the House of Representatives. With the exception of measures to raise revenue, which must originate in the House, bills may be introduced in either the House or the Senate. Steps in the progress of a bill in either house are essentially the same. Measures passed by one house must proceed to the other for final passage before going to the Governor for approval or veto.

For more information from the Texas House of Representatives Web Site, [click here](#).



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BRIEF ANALYSIS

No. 111

For immediate release:

Thursday, June 30, 1994

Competing Visions for Health Reform

Relatively simple reforms would go a long way toward solving our most pressing health care problems without creating new ones. Unfortunately, the underlying debate is not about how to solve our health care problems. It's about how our health care system should be organized.

Bureaucratic Vision. Under the Clinton plan, bureaucracies rather than individuals would make most of the important decisions. Most people would be forced to join health maintenance organizations (HMOs), whose doctors would serve as agents of the HMOs rather than their patients. Administrative interference in the doctor-patient relationship would be routine; doctors would be encouraged to practice "cookbook" medicine — following bureaucratic guidelines — and they would face intense pressure to avoid diagnostic tests, reduce hospital admissions and in other ways deliver lower-quality care.

President Clinton's proposed price controls and global budgets would make things worse by forcing HMOs to ration care. And bureaucrats would decide everyone's place in the waiting lines.

Patient Power Vision. The alternative to empowering bureaucracies is empowering individuals. Advocates of patient power believe that individuals should be free to control most of their own health care dollars, using insurance to pay rare, catastrophic expenses. Since most physicians' fees would be paid from personal Medical Savings Accounts (MSAs), doctors would become financial agents as well as health agents of their patients, helping them make wise decisions in a complex medical marketplace. The doctor-patient relationship would be based on the welfare of the patient, not on the financial self-interest of an HMO.

Can Individuals Make Good Decisions? Behind the bureaucratic vision of health reform is an enormous contempt for individuals. For example, explaining why people should not be allowed to control some of their

own health care dollars through Medical Savings Accounts:

- Hillary Rodham Clinton said that many people would save the money and skimp on health care "unless [they are] required to be responsible."
- Rep. Pete Stark (D-CA) has said that patients cannot make such decisions because they consider themselves "invincible" when well, but are "absolutely irrational, brain-dead, sniveling, begging and fantasizing ills and pains" when sick.

But if individuals aren't smart enough to choose their own doctors, are they smart enough to choose politicians who will choose their doctors for them?

Despite the assertions of the pro-bureaucracy reformers, individuals paying with their own money often negotiate better discounts with doctors and hospitals than do large insurance companies. Moreover, advocates of patient power expect people to take advantage of price discounts negotiated by their employers and to seek advice from experts. The key to patient power is the right to *refuse the advice*.

Should Individuals be Allowed to Make Their Own Decisions? One argument in favor of empowering individuals is that bureaucracies are threatening the quality of care patients receive — even without health care reform.

When Les Aspin became Secretary of Defense, he needed additional vaccinations because of his expanded international travel. In order to save \$1.55, however, his physicians gave him a cheaper but slightly more risky vaccine — and Aspin ended up in an intensive care unit. To our knowledge, he was never asked if he would be willing to pay \$1.55 out-of-pocket to avoid the risk.

Most proponents of managed care see little medical benefit in a cancer blood test known as prostate-specific antigen (PSA), and therefore do not routinely provide it. Fortunately U.S. Senator Bob Dole had the opportunity to make his own decision and opted for a PSA test in 1991. The test led to the biopsy and surgery the senator contends saved his life. Had Bob Dole been a member of an HMO, he might not be alive today.

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For more information: Jeanette Nordstrom or Briana Gowing 214/386-6272

BRIEF ANALYSIS

No. 114

For immediate release:

Wednesday, July 6, 1994

Community Rating A Cure Worse Than the Disease

Under "community rating" health insurers are required to charge the same premium to every policyholder, regardless of their expected health care costs. Under "modified" community rating, premiums may be adjusted by age and sex. Both types of regulation allow people who are already sick to purchase health insurance for the same price as those who are healthy. Thus:

- A person who has AIDS would be able to purchase health insurance for the same premium as someone who does not.
- People in hospital cancer wards would be able to purchase insurance for the same premium as people who do not have cancer.

Community rating is part of the Clinton administration's health care reform package. It is also present in a number of other reform proposals. Is it a good idea? Let's take a closer look.

Community Rating Would Increase the Costs of Health Insurance for Most People. In order to achieve a level premium for everyone, healthy people must be charged more so that sick people can be charged less. And, because most people are healthy, most people would eventually see their premiums rise. In 1993, the state of New York implemented legislation requiring insurers to (1) accept all applicants regardless of health status and (2) charge everyone the same premium for health insurance. According to the New York Department of Insurance:

- In the first year of community rating, almost 30 percent of the insured experienced premium increases ranging from 20 to 59 percent.

- Rates for a 30-year-old single male increased by 170 percent.

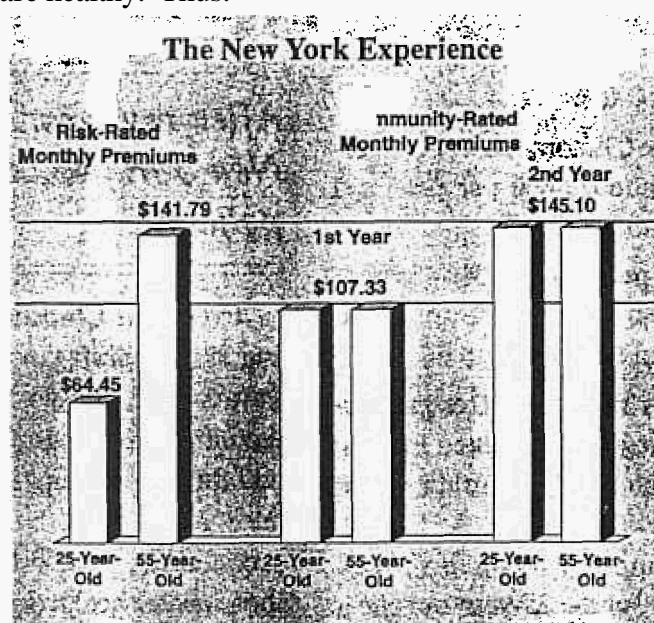
Consider the experience of Mutual of Omaha, the only major company besides Blue Cross selling individual policies in the state. Nationally, Mutual's claims (medical expenses paid under its policies) averaged about \$3,800 per family last year, an increase of only \$400 from 1992. But under community rating in New York, its average claim more than doubled, rising to

\$7,900. These increased claims resulted in a 35 percent increase in premiums, on top of a huge increase already adopted when community rating was implemented.

Community Rating Would Increase the Number of Uninsured. The intent of the New York law was to increase the number of insured by raising the premiums of the healthy in order to subsidize the premiums of those at high risk.

The result: as sick people entered the market, causing costs (and, therefore premiums) to rise, healthy people left. According to the New York Insurance Department, 43,666 individual policyholders have canceled their policies. Those moving out of the health insurance market are the younger, healthier segment of the population. Mutual of Omaha reports that under the new law the average age of its New York policyholders has increased by 3.5 years.

Community Rating Would Redistribute Income from the Poor to the Rich. Because community rating increases premiums for younger people and decreases them for older people, it results in a regressive system that penalizes those who can least afford to pay higher premiums. For example, nationwide the median annual

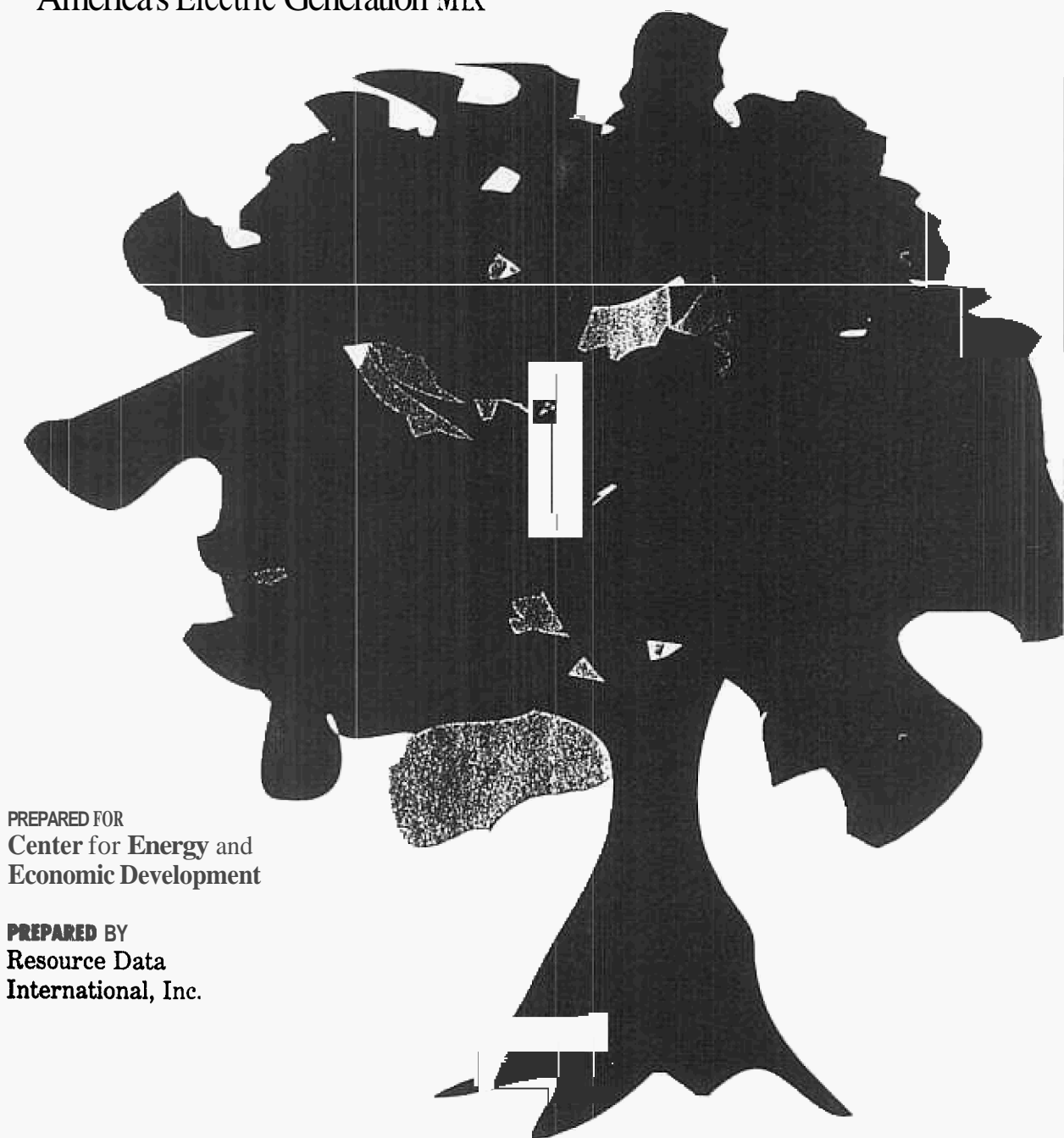


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For more information: Jeanette Nordstrom or Briana Gowing 214/386-6272

Energy Choices in a Competitive Era

The Role of Renewable and
Traditional Energy Resources in
America's Electric Generation Mix



PREPARED FOR
Center for **Energy** and
Economic Development

PREPARED BY
Resource Data
International, Inc.

Public Relations in Public Policy Advocacy Seminar

December 12, 1998

Marriott Hotel

Amman, Jordan

Agenda

**“Public Relation in Advocacy Work”
Workshop**

Saturday, December 12, 1998

09:00 a.m. - 12:00 p.m.

Marriott Hotel - Amman

AGENDA

08:30-09:00 Registration and Refreshments

09:00-10:15 Public Relations

Mr. Larry Milner
AMIR Consultant

10:15-10:30 COFFEE **BREAK**

10:30-11:15 Public Relations

11:15 -12:00 Group Discussion

12:00 Closing Remarks

Dr Zaki Ayoubi



Lesson Plan

ASSOCIATION PUBLIC RELATIONS (APR)

LESSON PLAN

Instructor: _____

Time Allotted:

Course Objectives..

Participants will:

1. Understand the importance of public relations for a business association and **what** needs to be communicated to whom
2. **Discuss the components** of a public relations program
3. Identify basic tools and audiences for **communications** planning
4. **Understand the steps** of developing a public relations program
5. **Understand crisis management from a public relations perspective**

| Time | Tasks | Ref. | Methods/Notes |
|------|-------|------|---------------|
|------|-------|------|---------------|

| | | | |
|--|------------------------|---------|--|
| | A. Introduction | OVHD #1 | |
|--|------------------------|---------|--|

| | | | |
|--|-------------------------------|--|--|
| | 1. Identify objectives | | |
|--|-------------------------------|--|--|

| | | | |
|--|---------------------------------------------------------------------------|--|--|
| | B. Understanding the Importance of Public Relations/Communications | | |
|--|---------------------------------------------------------------------------|--|--|

| | | | |
|--|----------------------------------------|---------------------------|--|
| | 1. What is a public relations program? | Manual p. 1 OVHD #2, 3 | |
|--|----------------------------------------|---------------------------|--|

- | | | | |
|--|----------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| | a. The way in which the business association communicates its mission, objectives, policies, activities or services to its various audiences | | |
|--|----------------------------------------------------------------------------------------------------------------------------------------------|--|--|

| | | | |
|--|-------------------------------------------------------------------------------------------|------------------------|--|
| | 2. Why are public relations /communications important to the business association? | Manual p. 2 OVHD #4 | |
|--|-------------------------------------------------------------------------------------------|------------------------|--|

- | | | | |
|--|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| | a. The association's objectives are translated into the program of work which is disseminated via communication tools b. Since associations are non-profit their power does not come from money, it comes from communications c. The organization must have a good public image in order to develop, retain and inspire leadership | | |
|--|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|

| | | | |
|--|-----------------------------------|------------------------|--|
| | 3. What needs to be communicated? | Manual p. 3 OVHD #5 | |
|--|-----------------------------------|------------------------|--|

| | | | |
|--|----------------------|--|--|
| | a. Value of products | | |
|--|----------------------|--|--|

- | | | | |
|--|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| | <ul style="list-style-type: none"> - member recruitment & retention - membership services and products - professional development - member benefit programs | | |
|--|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|

| Time | Tasks | Ref. | Methods/Notes |
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|------|-------|------|---------------|

b. Policy positions

- **status** of issues effecting **members**
- **policy** consequences
- **policy** alternatives

PR program should deal *only* with important matters - **pick your battles carefully**

It does no good *just* to do good " people must **know about organization**

C. Components of a Public Relations Program

Manual p. 3
OVHD #6

1. The organization should have a *soundly* conceived philosophy and objectives
2. The organization should have a program of work in writing designed to ~~meet~~ the needs of the general public and ~~members~~
3. The organization should be led by board ~~members~~ and officers who are strong and creative leaders
4. The organization should have an effective network of *committees*
5. The organization should have a results-oriented executive director and a ~~competent~~ staff
6. The organization should have a solid base! of support from members and other groups in the community

These **factors** will build credibility

| Time | Tasks | Ref. | Methods/Notes |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|---------------|
| | <p>D. Communication Tools (external and internal)</p> <p>1. Print Media</p> <ul style="list-style-type: none"> a. <i>Magazines</i> b. Brochures c. Bulletins d. Newsletters e. Flyers f. Annual Reports g. Special Reports h. Calendars i. Feature Articles j. Press Releases k. White Papers l. Op-Ed Articles m. Paid Advertisements <p>(in some countries associations will take out ads in newspapers)</p> <p>2. Broadcast Media - Television or Radio</p> <ul style="list-style-type: none"> a. Talk shows b. News c. Interviews d. Press conferences e. Media tours <p>3. Other Tools</p> <ul style="list-style-type: none"> a. Billboards b. National Surveys c. Membership Directories/Buying Guides d. Specialized Directories e. Posters f. Co-sponsored Events g. Created Events h. Recognition Awards i. Videotapes j. Speeches/Speakers Bureau k. Seminars, workshops | <p>Manual p. 4</p> <p>CVHD #7</p> | |

Time

Tasks

Ref.

Methods/Notes

E. Audiences (external and internal)Manual p. 4
OVHD #8

1. ~~Members~~
2. Nonmembers, potential and ~~former~~
3. Board
4. committees
5. chapters
6. State and Regional Organizations
7. Trade media
8. Professional media
9. Relevant **national** departments/ministries
10. **General** interest media **national/local**, broadcast/print
11. Related **organizations**
12. **Affinity** groups
13. **Legislators** and **key** personnel
14. Foundations, Donors
15. Corporations
16. **Prominent** Individuals

F. Developing a Public Relations ProgramManual p. 5
OVHD #9

1. Who should be involved?
 - a. Public relations/communications **committee**
 - b. Executive **Directors**
 - c. Public Relations Director
 - d. **Key** Board of **Directors**
2. Assessment of Current **Program** (Public Relations Audit)
 - a. **Surveys**
 - b. ~~Personal~~ Contact **with** media, government, other **organizations**, non-members and delinquent members
 - c. Outside research groups
3. Identify objectives of public relations program
 - a. **"Raise** the level of **awareness** of **target audiences** of the value of ABC association"
 - b. "Create **awareness** of ABC association's

Time

Tasks

Ref.

Methods/Notes

role in the community"

c. "Enhance credibility and political influence"

d. "Toster membership growth"

4. Identify key audiences

5. Determine what you need to do more of, more effectively or differently

6. Develop program elements (with budget) - identify tools and audiences

7. Get Committee and Board Approval

8. Supervise and train staff in implementation of public relations program

9. Monitor and report on implementation

Did the program communicate the association's message?

Did we reach intended audiences?

Did they do what we wanted?

NOTE: In some countries it is possible for associations to contract public relations agencies. In those countries it is suggested that instructors analyze the pros and cons of in-house services vs. contracting out

G. Publications

1. Publications are reflection of association

2. Publications sell value of association

3. Compare with other publications

4. ~~Must~~ be in tune with members needs

Manual p. 6
OVHD #10

| Time | Tasks | Ref. | Methods/Notes |
|------|-------|------|---------------|
|------|-------|------|---------------|

5. ~~Must~~ be in tune with association's needs

6. Select the right types of publications

- a. ~~Newsletters~~
- b. Directories
- c. ~~Books~~
- d. Magazines
- e. Annual reports
- f. Journals
- g. ~~Byer's~~ guides

- Analyze purpose of the publication
- Analyze audience
- *Analyze content* - newsletters are designed to be read quickly, etc.

7. ~~Use~~ strong Editorial ~~Content~~

8. ~~Use~~ an editorial board

9. Package the publication effectively

10. Finance the Publication

- a. Subsidizing through dues - partially or fully
- b. Selling subscriptions
- c. selling advertising

11. Get member feedback

- a. Member feedback is vital to success
- b. Surveys, readership involvement studies, focus groups
- c. Look ~~at~~ other groups publications

12. Tips for good newsletter writing

- a. Write in familiar vein - as if writing to a friend

Manual p. 7
OVHD #11

| Time | Tasks | Ref. | Methods/Notes |
|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|---------------|
| | <p>b. Try to restrict use of association name in lead of <i>every story</i></p> <p>c. Use active verbs</p> <p>d. Don't try to fit the five w's in the first paragraph if it will be boring: The Chamber's Annual meeting will be held at the Amway Room at 5:00p.m. on June 21</p> <p>e. Don't list an entire committee in the lead</p> <p>f. <i>Keep</i> paragraphs short</p> <p>g. Don't <i>repeat</i> the headline in the lead or vice-versa</p> <p>h. Take <i>out</i> unnecessary words</p> <p>i. Don't exaggerate</p> <p>j. Use statistics- do research</p> <p>k. Don't assume that the reader knows what you are talking about - spell out acronyms first time used</p> | | |
| | <p>HL Verbal Communication</p> <p>1. Public speaking:</p> <p>Train leaders in speaking. Help them with the steps to tackle anxiety:</p> <p>a. Speech d o n - write <i>speech</i> considering audience</p> <p>b. Modeling - watch examples of good speakers and use their techniques</p> | <p>Manual p. 8</p> <p>OVHD #12</p> | |

| Time | Tasks | Ref. | Methods/Notes |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|---------------|
| | <p>c. Goalsetting-beable to speak for 10 minutes instead of 2</p> <p>d. Covert rehearsal - practice alone</p> <p>e. Practice in front of a friendly audience</p> <p>f. Give the speech (make <i>sure</i> they dress professionally and know the subject)</p> <p>2. Interviewing</p> <p>If interviewing follow these rules:</p> <ol style="list-style-type: none"> 1. Don't be afraid of reporters 2. Never say "no comment" it means "we are guilty" 3. Remain silent while you pause to think 4. Be honest 5. Make sure that your <i>answer</i> is <i>easy</i> to understand | | |
| | <p>L Media Communication</p> <ol style="list-style-type: none"> 1. Determine media targets - find out who usually covers business issues 2. Meet the people you will be dealing with 3. Become a news creator - hop on emerging issues or create issues through association research 4. Develop a press kit | <p>Manual p.8</p> <p>OVHD #13</p> | |

| Time | Tasks | Ref. | Methods/Notes |
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| | <p>a. one page <i>summary</i> of the association</p> <p>b. brochures</p> <p>c. staff list</p> <p>d. photos of important staff</p> <p>e. legislative goals and policy positions</p> <p>5. Use press conferences sparingly</p> <p>6. Write letters to the editor and editorials - inexpensive</p> <p>7. Don't forget to publicize soft news - community projects</p> <p>8. Decide who should communicate - staff, volunteers and prominent members</p> <p>9. Use press as a marketing tool, let them advertise your events for you</p> <p>10. Write press releases:</p> <p>a. For text: using the five Ws - who, what, when, where, why</p> <p>b. Write effective leads:</p> <ul style="list-style-type: none"> - make the reader want to read on - highlight the main point even if you don't put all five Ws in the lead - draw the reader in through personal desire or experience - don't be overly creative if it doesn't fit <p>c. Mistakes of press releases:</p> <ul style="list-style-type: none"> - out of date mailing lists - undated press releases - missing basic information | <p>Manual p. 9</p> <p>OVHD #14</p> | |



- too long
- poorly written
- ~~sending~~ same release to 10 people in same organization (just ~~use~~ one contact person)

J. Community Service

1. Benefits of **community service** are not **only** good pr for the organization • in addition the association benefits through:

- a. Identifying future **leaders**
- b. **Increased organizational visibility**
- c. **Increased** number of donors
- d. Attracts new members
- e. ~~Deeper~~ member involvement

2. Types of activities

- a. **Adopt a road**
- b. Fund raising for charity
- c. Awards
- d. Scholarships

Manual p. 10
OVHD #15

K. ~~Crisis~~ Management

1. Be proactive. Develop a communications strategy ~~before a~~ problem **arises**, to launch new issues, activities or products.

2. Develop a crisis plan • brainstorm with **staff** about 10 possible things that could go wrong and how **they** would be **handled**, then prepare a one page document naming spokesperson and policies for directing **inquiries**

3. When **crisis arises**, take the initiative-explain negative news ~~story~~ **as soon as possible** so

Manual p. 11
OVHD #16

| Time | Tasks | Ref. | Methods/Notes |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|---------------|
| | <p>people know your side of the story</p> <p>4. Assign one spokesperson</p> <p>5. Get all the facts before making any statements</p> <p>6. Never lie to or mislead a news reporter</p> <p>7. Don't lose your temper or make threats</p> <p>8. Always correct factual errors</p> <p>9. Keep things in perspective • crises aren't always as big as they seem</p> | | |

MATERIALS TO BE USED (MATERIALS WILL BE INDICATED WITH AN "X" SINCE NOT ALL MATERIALS ARE USED IN ALL COUNTRIES):

- X
"Building a Communications Driven Chamber," by Win Borden, U.S. Chamber of Commerce
"Strategies and Techniques for Effective Op-Eds," by the International Center for Economic Growth
Principles of Association Management. A professional's handbook, American Society of Association Executives Chapter 11
"A Guide to Communicating with Members of Congress," U.S. Chamber of Commerce
"Publicity and Public Relations," U.S. Chamber of Commerce, 1987
- X
"Coordinate What You Communicate," Association Management, July 1994

Overheads

**OVERHEADS FOR:
ASSOCIATION PUBLIC
RELATIONS
(APR)
MODULE**

ASSOCIATION PUBLIC RELATIONS

Course Objectives:

Participants will:

1. Understand the importance of public relations for a business association and what needs to be communicated to whom
2. Discuss the components of a public relations program
3. Identify basic tools and audiences for communications planning
4. Understand the steps of developing a public relations program
5. Understand crisis management from **a** public relations perspective

WHAT IS A PUBLIC RELATIONS PROGRAM?

The way in which the business association communicates its mission, objectives, policies, activities or services to its various audiences

WHY ARE PUBLIC RELATIONS *AND* COMMUNICATIONS IMPORTANT?



WHAT NEEDS TO BE COMMUNICATED?

1. Value of products

- member recruitment & retention**
- membership services and products**
- professional development**
- member benefit programs**

2. Policy positions

- status of issues effecting members**
- policy consequences**
- policy alternatives**

COMMUNICATIONS AUDIENCES

- 10 Members**
- 20 Non-Members, potential and former**
- 3. Board**
- 4. Committees**
- 5. Chapters**
- 0 State and Regional Organizations**
- 7. Trade media**
- 8 Professional media**
- 9. Relevant national ministries**
- 100 General interest media**
- 110 Related organizations**
- 12. Affinity groups**
- 13. Legislators**
- 14. Foundations, Donors**
- 15. Corporations**
- 16. Prominent Individuals**

DEVELOPING A PUBLIC RELATIONS PROGRAM

1. **Who should be involved?**
Public relations/communications committee, Executive Director, Public Relations Director, key Board of Directors
2. **Assessment of Current Program**
Surveys, Personal Contact, Outside research groups
3. **Identify objectives of public relations program**
4. **Identify key audiences**
5. **Determine what you need to do more of**
6. **Develop program elements**
7. **Get Committee and Board Approval**
8. **Supervise and train staff**
9. **Monitor and report on implementation**

PUBLICATIONS

- 1. Publications are reflection of association**
- 2. Publications sells value of association**
- 3. Compare with other publications**
- 4. Must be in tune with members needs**
- 5. Must be in tune with association's needs**
- 6. Selecting the right type of publication**
- 7. Use strong editorial content**
- 8. Use an editorial board**
- 9. Package the publication effectively**
- 10. Finance the publication**
- 11. Get member feedback**

Tips for newsletter writing

- *Write in familiar vein - as if writing to a friend*
- *~~Try~~ to restrict use of association **name** in lead of every story*
- *Use active verbs*
- *Don't put the five w's in the first paragraph if it will be boring*
- *Don't list an entire committee in the lead*
- *Keep paragraphs short*
- *~~Don't~~ repeat the headline in the lead or vice-versa*
- *Take **out** unnecessary words*
- *~~Don't~~ exaggerate*
- *~~Use~~ statistics - do research*
- *Don't **assume** that the reader **knows** what **you** are talking about*

VERBAL COMMUNICATION

1. Public Speaking Steps:

- a. **Speech creation**
- b. **Modeling**
- c. **Goal setting**
- d. **Covert rehearsal**
- e. **Practice in front of a friendly audience**
- f. **Give the speech**

2 Interviewing

- a. **Don't be afraid of *reporters***
- b. **Never say "no comment"**
- c. **Remain silent while you pause to think**
- d. **Be honest**
- e. **Make sure that your answer is easy to understand**

MEDIA COMMUNICATION

1. Determine media targets
2. Meet the people you will be dealing with
3. Become a news creator
4. Develop a press kit
5. Use press conferences sparingly
6. Write Op-Ed pieces
7. Publicize soft news
8. Decide who should communicate
9. Write press releases
10. Use press as a marketing tool

Writing effective press releases:

1. For text: use the five Ws

2 Write effective leads:

- make the reader ~~want~~ to read on
- highlight the main point
- ~~draw~~ the reader in through personal experience
- don't be overly creative if it doesn't fit

3. Mistakes of press releases:

- out of date mailing lists
- undated press releases
- missing basic information
- too long
- poorly written
- sending same release to 10 people in same organization

COMMUNICATIONS CRISIS MANAGEMENT

1. Be proactive
2. Develop a crisis plan
3. When crisis arises, take the initiative
4. Assign one spokesperson
5. Get all the facts before making any statements
6. Never lie to or mislead a news reporter
7. Don't lose your temper or make threats
8. Always correct factual errors
9. Keep **things** in perspective

COMPONENTS OF A PUBLIC RELATIONS PROGRAM:

1. The organization should have a soundly conceived philosophy and objectives
2. The organization should have a program of work in writing designed to meet the needs of the general public and members
3. The organization should be led by board members and officers who are strong and creative leaders
4. The organization should have an effective network of committees
5. The organization should have a results-oriented executive director and a competent staff
6. The organization should have a solid base of support from members and other groups in the community

COMMUNICATIONS TOOLS

1. PRINT MEDIA

2. BROADCAST MEDIA

3. OTHER

Examples



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MAYOR

OFFICE OF THE MAYOR

P.O. BOX 1088
AUSTIN, TEXAS 78767
512 499-2250
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kirk.watson@ci.austin.tx.us

For immediate release

March 27, 1998

Contact: Larry Warshaw, Mayor Kirk Watson's Office, 499-2250

Chamber, SOS endorse Smart Growth ballot package

Two community groups that understand the link between Austin's economic health and its environment announced today, March 27, their endorsements of the May 2 Smart Growth City bond proposals.

Representatives of the Greater Austin Chamber of Commerce and the Save Our Springs Alliance joined Mayor Kirk Watson in support of the three ballot propositions.

"The May 2nd bond election is the most important election for our quality of life since Austin voters approved the SOS Initiative in 1992," said Robin Rather, SOS Board President. "The bonds represent a tremendous opportunity for our community to begin the process of smart growth. I want to praise the Mayor, City Council and Greater Austin Chamber of Commerce for this landmark and historic effort to work together to protect our community's quality of life."

"We strongly support the Smart Growth Initiatives of the Mayor and City Council," said Gary Valdez, Chairman of the Greater Austin Chamber of Commerce Board. "Our unique environment is part of what makes Austin such an attractive place

--more--

Executive Alert

ALL THAT'S NEW IN THE WORLD OF IDEAS

IN THIS ISSUE

- Hurting the Uninsured 2
- Hidden Costs of Medicaid and Medicare 2
- Impact of the Clinton Health Plan 3
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- Recycling is a Waste 6
- a Fooling with Data on Smoke 6
- Free Markets vs. Closed **Doors** 7



NCPA Policy Chairman Pete du Pont and NCPA President John Goodman discuss the concept of managed competition at an NCPA Forum on health care reform on Capitol Hill. See *The Clinton Plan*, page 3.

Congress' Choice

Despite the increasing popularity of school choice programs at the state level, "Goals 2000," the Clinton administration's proposal to revamp the nation's public schools, does little to make choice easier.

Congressional opponents of choice argue that making it financially possible for lower-income parents to choose private education would undermine the public schools. Yet many members of Congress take a different view when making decisions about their own children.

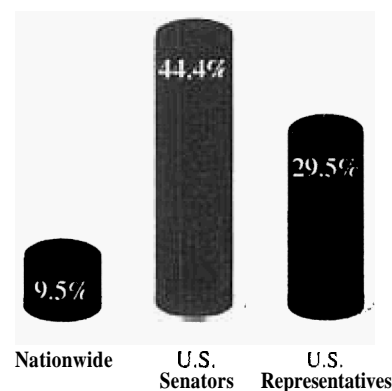
● Nationwide, 9.5 percent of school-age children are in private schools.

■ But 44.4 percent of senators and 29.5 percent of representatives who have children and responded to a survey have sent their children to private schools.

a Among members of committees

Many congressional opponents of choice send their own children to private schools.

FAMILIES WITH CHILDREN IN PRIVATE SCHOOLS



Source: Heritage Foundation

drafting school reform legislation, half of those on the Senate Labor and Human Resources Committee chose private schools, as did 25 percent of Republicans and 14.3 percent of Democrats on the House Education and Labor Committee.

■ Seventy percent of the members of the Congressional Hispanic Caucus and 29.6 percent of the Congressional Black Caucus chose private schools, compared to 5.9 percent of Hispanics and 4.3 percent of blacks nationwide.

Besides members of Congress, President Clinton, who also opposes school choice, sends his daughter Chelsea to a private school in Washington.

Source: Allyson M. Tucker and William F. Lauber, "How Members of Congress Exercise School Choice," *F.Y.I.*, February 1, 1994, Heritage Foundation, 214 Massachusetts Avenue, NE, Washington, DC 20002, (202) 546-4400.

■ GOVERNMENTAL RELATIONS

Chamber Board Adopts Legislative Platform for '99

Here are the legislative priorities adopted by the Chamber's board at a recent meeting:

STATE ISSUES

TRANSPORTATION — The legislature should consider methods to enhance funding for critical roadway and other transportation construction. The reduction of the backlog of projects in the Austin region is crucial, specifically: SH 71E, U.S. 290 W, US 183N, and SH 130.

Due to the strong economy, the Austin area has experienced phenomenal population growth and is expected to double its population over the next 20 years. The completion of these roadways is crucial to the economic vitality of our region, state, and country due to NAFTA. Support of alternative modes of transportation such as light rail and the commuter rail between Austin and San Antonio is essential and would provide safe and efficient travel.

The Chamber urges the legislature to increase annual appropriations to TxDOT by (1) funding the Department of Public

Safety from a source other than State Highway Fund 006 so that Fund 006 resources can be used to maintain and expand road and bridge infrastructure; (2) provide permanent legislative safeguards against the gradual encroachment on dedicated gasoline tax funds for non-highway uses. At the same time, the DPS, an agency so critical to public safety, should receive its own independent and secure funding.

BACKGROUND — *Inadequate transportation infrastructure is the main obstacle to continued economic development. The Chamber has made improvement of transportation infrastructure its number one strategic initiative for the past two years.*

State Highway Fund 006 was designed to provide funds for maintaining and expanding road and bridge infrastructure in Texas with a capped amount of \$60 million per biennium going to DPS. However, during the 1980 state budget deficits, the Legislature removed the cap and increased the transfer to \$600 million per biennium. A budget surplus of an estimated \$3.6 billion dollars is expected when the legislative session begins in 1999. A portion of the surplus should be applied to DPS, therefore allowing fund 006 to be used for roads and bridges.

EDUCATION — The legislature should provide additional state funding for increased enrollment, teacher salaries, K-12 reading initiatives, extended instruction in public schools, and additional funding for fast-growing urban school districts. The legislature should also strengthen the financial accountability of school districts and continue to improve Texas' nationally recognized assessment system, which has helped lead to dramatic performance improvements over the last five years.

BACKGROUND — *The amount of state funding for public schools is not keeping up with the rapid enrollment growth. The legislature has initiated financial accountability of school districts, but more steps are needed to ensure that funds are used appropriately and efficiently.*

(continued on page 5)

■ PRESIDENT'S REPORT

(continued from page 3)

impact taxes and the community's quality of life. We believe it is the Chamber's obligation, on behalf of those businesses, to challenge a law which precludes businesses from supporting or opposing ballot issues.

The Chamber and TSAE are not challenging the \$100 limitation on contributions to political candidates.

We are hopeful of a speedy resolution of this item so that businesses can support the November 3 infrastructure bond issue. The bond issue contains funding for many needed projects including new roadways, synchronization of traffic signals, emergency medical services, parks, libraries and other worthy initiatives.

Matching



"When you have a staffing need, Ashby Staffing's Exact Match program helps ensure your problem gets solved. It's the brightest idea in the industry."

Ashby's Exact Match program documents skills, training, experience, personality and professionalism of all our people. Then, using the industry's most advanced staffing management software, we find just the right person for your unique needs. We work hard at finding the exact match — because it means increased productivity and performance for you. We don't accept less than the best and neither should you.

Ask us more about our Exact Match program. What you hear will make you shine."

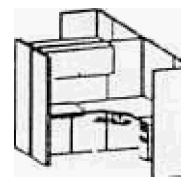
Pam Lukovics
Manager, Client Services

We Make You Shine!



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PUBLIC POLICY FORUM

The Political Newsletter of Texas Business ♦ Third Quarter 1994

TABPAC endorses bipartisan slate of candidates for top state offices

The Texas Association of Business Political Action Committee (TABPAC) Board of Directors, whose members are elected statewide from each local chapter of Texas Association of Business, has voted to endorse a bipartisan slate of candidates for the 1994 general election in November.

TABPAC Board members evaluated candidates on their support for Texas business on a wide variety of issues, including workers' compensation reform, tort reform, transportation reform, budget and tax policy.

In the race for U.S. Senate, the TABPAC Board, through TAB Fed PAC, voted to endorse a former TAB member, U.S. Sen. Kay Bailey Hutchison (R). Breaking with a tradition of not becoming involved in races for federal office, the Board strongly believed that the re-election of Sen. Hutchison to the U.S. Senate was of paramount importance to business people in the state.

In addition to her voting record in support of fiscally conservative budget policy, the senator's strong stands for NAFTA and against the Striker Replacement Bill were both

considered by Board members. Both Sen. Hutchison and her opponent in the race, Richard Fisher (D), made individual presentations to the TABPAC Board at a Sept. 7 meeting.

In what is expected to be a close race for governor, the TABPAC Board of Directors voted to support George W. Bush (R). Appearing before a June 15 TABPAC Board meeting, Bush emphatically advocated comprehensive tort reform for Texas business, and indicated his support for the workers' compensation reforms that TAB fought to enact in 1989 — reforms that are estimated to be saving the Texas economy more than \$2 billion per year.

At the meeting, Bush also voiced support for free market reforms regarding the regulation of the transportation industry in Texas. He also assured Board members that



The TABPAC Board of Directors has endorsed (pictured, from left to right) U.S. Sen. Kay Bailey Hutchison for U.S. Senate, George W. Bush for governor and Lt. Gov. Bob Bullock for lieutenant governor in the Nov. 8 election.

his gubernatorial appointments to boards and commissions in Texas would keep economic growth and job creation issues in consideration.

Gov. Ann Richards had declined an invitation to speak before the TABPAC Board on June 15.

The office of lieutenant governor is often referred to as the most powerful in Texas government. As the presiding officer of the Texas Senate, this elected official determines which legislation moves forward and which legislation dies. The TABPAC Board voted to endorse Bob Bullock (D) for re-election to this important post.

As lieutenant governor, Bullock has worked closely with TAB on tort reform and other issues affecting employers. He also has indicated support for deregulation of intrastate trucking and other issues vital to preserving jobs.

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How does business measure up?
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- Also... See pages 4-5 for a list of TABPAC endorsements for the 1994 election!

YOUR VOTE IS YOUR VOICE!

Can the pro-business candidates
count on your vote in '94?

Election Day is Nov. 8. Early voting begins Oct. 19.

A quarterly publication of the Texas Association of Business Political Action Committee (TABPAC)



THE AMERICAN EXPERIMENT
by Pete du Pont

The Challenge of U.S. Healthcare Reform: An American College of Healthcare Executives Perspective (cont.)

- Balance available resources with healthcare needs. Healthcare priorities should be influenced by an educated public so that the nation's available resources are used appropriately.
- Provide for **fair** provider reimbursement, recognizing the actual cost of providing a healthcare service.
- Apply consistent incentives for individuals, employers, and providers to promote **efficient** and effective health-care delivery.
- Equitably spread the responsibility for financing health-care services among all parties, including government.
- Reform the professional liability system to avoid needless expenses, for example, to minimize the costs attributed to the practice of defensive medicine.

Foster quality in healthcare delivery.

- Focus on clinical outcome measures that reflect improvements in the health status of individuals and/or populations.
- Encourage use of valid and reliable data that clearly define cost-effective care based on clinical outcomes.

Provide mechanisms to recognize and support innovation and advances in technology, **as** well as clinical and health services research, **to** improve the community's health status.

Promote solutions to societal and environmental problems that have an impact on community health.

- Encourage development of educational programs and other initiatives that address the many problems underlying our nation's health, such as violence and drug abuse.

- Support services that monitor, protect, and/or improve the environment, recognizing the impact of the environment on individual health and community well-being.
- Provide for healthcare services that emphasize health promotion and illness prevention, in part through comprehensive education that furnishes individuals with the knowledge and **skills** to maintain and improve their own health.

Provide a framework for implementing and evaluating specific reforms.

- Reduce and simplify paperwork requirements that currently act **as** disincentives to obtaining or delivering healthcare.
- In recognition of the complexity of healthcare delivery, demonstration or pilot projects should be considered **as** viable mechanisms to further evaluate the impact of new healthcare delivery models before healthcare reform is fully implemented.
- Identify **a** methodology for evaluating and communicating "reform" progress on an ongoing basis and provide the resources to implement such an evaluation.

Approved by the Board & Governors of the American College of Healthcare Executives on February 28, 1997.



The Challenge of U.S. Healthcare Reform: An American College of Healthcare Executives Perspective

*December 1993
February 1997 (revised)*

Statement of the Issue

The American College of Healthcare Executives recognizes that the U.S. healthcare delivery system is in the midst of change, marked by increasing public concern over the cost, availability, and quality of healthcare services. As a professional society of healthcare executives—many of whom lead U.S. hospitals, health maintenance organizations, and other healthcare delivery organizations—the College is well-positioned to assist policymakers in developing public policy to meet the nation's healthcare needs.

All healthcare executives have a professional obligation to be effective leaders within their own organizations. Furthermore, they have an obligation to their communities to enhance healthcare availability and accessibility and ultimately improve community health status. In carrying out these obligations, healthcare executives must manage healthcare organizations in an ethical and effective manner that emphasizes community service and promotes public trust.

As the catalysts of change within the healthcare delivery system, healthcare executives must clearly define their views regarding the appropriate roles of the private sector and government at all levels. Given the ongoing dialogue, these philosophical differences range from full government regulation to market-based approaches that emphasize competition as the prerequisite to controlling healthcare costs. In recognition of this diversity in public opinion, the College believes every healthcare executive can contribute to the healthcare reform debate.

Policy Position

In keeping with the above views, the American College of Healthcare Executives believes that any U.S. healthcare reform package enacted into law should:

Ensure universal access to healthcare services.

- Provide universal access to a societally agreed upon “core” set of healthcare services. Ideally, core benefits should:
 - Provide for emergency care services so that an individual's medical needs are promptly addressed and not jeopardized by inability to pay.
 - Reflect the culturally diverse healthcare needs of our nation. Healthcare services should be based on the healthcare needs of the community and should address barriers that may exist due to geography or other factors such as language differences.
- Provide incentives for medical, nursing, and allied health professions education that address inequities in the number, type, and distribution of caregivers.
- Provide appropriate incentives to encourage the delivery of care to underserved areas.
- Encourage informed decision-making by providing information that helps individuals select and use their healthcare coverage responsibly. Information must be understandable and address the cost and quality of healthcare plan options.
- Provide for mechanisms that safeguard the individual's right to make informed decisions about his or her healthcare treatment.

Balance costs and resources for healthcare services.

- Improve efficiency in the system while increasing the availability of healthcare services by promoting partnering and collaboration among healthcare providers and other community stakeholders. Antitrust reform should minimize legal and regulatory obstacles so that healthcare organizations can effectively address community needs.

Access to Healthcare (cont.)

Leadership opportunities abound. The College urges all healthcare executives to:

- Develop policies within healthcare organizations to ensure access.
- Manage their organizations efficiently to help underwrite healthcare costs of indigent care.
- Encourage and assist trade and other professional associations in becoming actively involved in access to care issues.
- Advocate funding to support increased access from local, state, and federal government representatives, legislators, and regulators.
- Promote shared leadership and funding responsibilities to employers, private insurers, and consumers.
- Organize or participate in local, regional, and state task forces to resolve the access problem.
- Spearhead discussions with the public and other key audiences (e.g., policymakers) to define community healthcare priorities so that healthcare resources can be used most equitably and effectively.

The role of healthcare executives has always been to translate social values into workable healthcare programs. Healthcare executives have the opportunity and the social mandate to work to develop new ways to finance and deliver healthcare.

Approved by the Board & Governors & the American College & Healthcare Executives on May 1, 1994.



PUBLIC POLICY STATEMENT

Access to Healthcare

May 1986

June 1986 (revised)

May 1994 (revised)

Statement of the Problem

At one time, healthcare institutions could depend on revenues from insurers and government who recognized the need to underwrite a portion of the cost for care provided to the poor and uninsured. However, cost containment is the new imperative, and patients, employers, unions, insurers, and government are no longer willing to pay such a subsidy. Those who are able to pay for healthcare demand services for the lowest possible charge. Budget pressures also compel governments to reduce programs for the poor and uninsured, leaving many without public or private support for healthcare.

Healthcare executives cannot be expected to commit their organization to provide services without covering their costs. Without adequate revenue, access to needed healthcare service will be diminished. As healthcare becomes more competitive, price sensitive, and consumer driven, the situation will only worsen. The healthcare system is in danger of losing its capacity to care for the poor. The American College of Healthcare Executives urges society to guard against these threats to access and challenges its membership to develop creative solutions to the problem.

Finally, in light of discussions surrounding healthcare reform and the possibility of expanding access to healthcare services, the public is faced with difficult choices about how the nation's healthcare resources should be effectively utilized. As healthcare leaders within the community, healthcare executives should spearhead the development of a community consensus to determine how healthcare resources and needs should be balanced.

Policy Position

The American College of Healthcare Executives believes no person should be denied necessary healthcare services because of inability to pay. Health is essential to a fully productive, high-quality life, and everyone should have the

opportunity to enjoy good health. The lack of adequate private or public healthcare insurance for millions of people presents an urgent dilemma: fulfilling individual healthcare needs vs. sustaining a financially viable healthcare system. Healthcare executives cannot rely exclusively on government funding to fully finance the needs of every individual requiring healthcare services.

It is the responsibility of all healthcare executives to search actively for new ways to finance and deliver healthcare for those unable to pay. Whether affiliated with for-profit or not-for-profit, free-standing, or multi-institutional systems, healthcare executives cannot be silent on the issue of access. As community leaders they are in a pivotal position to initiate and implement innovations that facilitate care for the medically indigent.

The complexity and severity of the problem requires attention at all levels—federal, state, and community—and by all sectors of society. In fulfilling their management role, healthcare executives must operate efficient, effective organizations that are capable of caring for the poor. Working with other agencies and groups to raise the level of resources available, healthcare executives must work to create new payment systems, encourage philanthropy, and promote revenue-generating opportunities.

Healthcare executives must convince government leaders to fund healthcare services both for the indigent and the uninsured. With business leaders, they must work to both expand private employee healthcare insurance coverage and increase the level of business contributions to charity care. They must bring together insurers and other payors, physicians, and other healthcare professionals to enhance existing approaches in order to create new approaches to healthcare finance and delivery. Through dialog, debate, and cooperation with all these groups, healthcare executives must reshape the system to equitably spread the cost of healthcare.



Terms of Employment for Healthcare Executives

November 1393

Statement of the Issue

The American College of Healthcare Executives recognizes that in the face of profound changes in the healthcare delivery system, chief executive officers and other senior-level healthcare executives will increasingly need to address changing external demands and mounting internal pressures. To fulfill their responsibilities for executive decision making and innovative organizational leadership, these individuals will be compelled to make decisions that may expose them to significant risk, both personal and financial. The hospital CEO turnover rate is one indication of the volatility of such senior-level positions. The hospital CEO turnover rate was 14.5 percent in 1992.

Because of the link that exists between leadership continuity and overall organizational performance, it is in the best interest of both the organization and the community it serves to provide CEOs and other appropriate senior-level executives with certain, well-defined employment protections. Such protections encourage prudent decision making, create a climate of mutually understood expectations and demonstrate a commitment to fair employment practices.

Policy Position

The American College of Healthcare Executives believes that healthcare organizations should provide employment protection to their chief executive officers and other appropriate senior-level healthcare executives, because their responsibilities to their employers place them at significant personal and financial risk.

The College encourages all healthcare organizations to wholeheartedly pursue the following actions:

Provide executive employment contracts to their chief executive officers with a goal of establishing conditions conducive to the exercise of strong and innovative CEO leadership.

- Provide executive employment contracts or letters of agreement to all other appropriate senior-level executives to similarly promote strong and innovative leadership.
- Provide CEOs with the contractual assurance of a minimum of one year's total compensation (salary and all benefits) upon termination, with the ability to accrue additional severance pay depending on tenure in the position and other contractual agreements.
- Provide other appropriate senior-level executives with a minimum of ~~six~~ months' severance pay upon termination and the ability to accrue additional severance pay depending on tenure in the position and other contractual agreements.
- Provide chief executive officers and other appropriate senior-level executives with comprehensive outplacement services in the event of job termination, including assistance in career plan development and job-search assistance.

Reference

American College of Healthcare Executives, *Contracts for Healthcare Executives* (Chicago: American College of Healthcare Executives, 1987).

Approved by the Board of Governors of the American College of Healthcare Executives on November 15, 1993.

Evaluating the Performance of the Hospital CEO

November 1993

Statement of the Issue

Board evaluation of the hospital chief executive officer has long been an important way to ensure that performance expectations are mutually understood and that progress is being made toward their attainment. In an environment characterized by reform and uncertainty, the CEO's performance evaluation both assumes new significance and requires important changes to the nature and frequency of the CEO evaluation. The evaluation process should be viewed as an important tool for measuring leadership effectiveness.

Policy Position

The American College of Healthcare Executives believes that hospitals should evaluate their chief executive officers using the following principles:

- Expectations of the CEO, expressed in terms of well-defined benchmark objectives, should be clearly identified well in advance of the evaluation to ensure that the evaluation will be a meaningful assessment of progress made on mutually understood goals.
- The evaluation should be a continuous, year-long process culminating in a formal, annual performance review that contains no surprises for either the evaluators or the CEO. Continuous evaluations are a way to provide meaningful feedback on many aspects of hospital operations and clarify misunderstandings resulting from poor communication or lack of expertise in particular areas.
- The evaluation process should enhance the working relationship of and information-sharing between the CEO and the board, rather than be a one-directional process. The CEO should have an employment contract to further facilitate understanding of mutually understood expectations.
- The evaluation should link attainment of organizational objectives with the CEO's personal performance objectives. Two key organizational objectives should be considered in the CEO's performance evaluation: 1) the institution's contributions to areawide health status and 2) institutional success. Professional role Fulfillment—the CEO's personal performance goals—should be the third component of the evaluation.
- Data, not subjective assessments, should be the mainstay of the CEO's performance evaluation. Hospitals should review data on how systems, e.g., efficiencies in patient admissions, accounts receivable, are working. Because the CEO is ultimately accountable for the Functioning of such systems, data about their effectiveness is among the determinants of the CEO's performance.
- Board self-evaluations are an important enhancement to the evaluation process, because they further build on the concept of mutually understood expectations. Consider conducting self-evaluations of the full board and of individual members.
- Although overall system performance is an important measure of CEO effectiveness, the CEO's salary increases must also be tied to individual performance as measured by the evaluation.

Reference

American College of Healthcare Executives and American Hospital Association, *Evaluating the Performance of the Hospital CEO in a Total Quality Management Environment* (Chicago: American College of Healthcare Executives, 1993).

Approved by the Board of Governors of the American College of Healthcare Executives on November 15, 1993.



ETHICAL POLICY STATEMENT

Creating an Ethical Environment for Employees

March 1992

August 1995 (revised)

Statement of the Issue

The number and magnitude of challenges facing healthcare organizations are unprecedented. Growing financial pressures, rising public and payor expectations, and the increasing number of consolidations have placed hospitals, health networks, managed care plans, and other healthcare organizations under greater stress—thus potentially intensifying ethical dilemmas.

Now, more than ever, the healthcare organization must be managed with consistently high professional and ethical standards. This means that the executive, acting with other responsible parties, must support an environment conducive not only to providing high-quality, cost-effective healthcare, but which also encourages individual ethical development.

The ability of an organization to achieve its full potential will remain dependent upon the motivation and skills of its staff. Thus, the executive has an obligation to accomplish the organization's mission in a manner that respects the values of individuals and maximizes their contributions.

Policy Position

The American College of Healthcare Executives believes that all healthcare executives have an ethical and professional obligation to employees of the organizations they manage to create a working environment that supports, but is not limited to:

- Responsible employee ethical conduct and behavior;
- Free expression of ethical concerns and mechanisms for discussing and addressing such concerns without retribution;
- Freedom from all harassment, coercion, and discrimination;

- Appropriate utilization of an employee's skills and abilities; and

- A safe work environment.

These responsibilities can best be implemented in an environment where all employees are encouraged to develop the highest standards of ethics. This should be done with attention to other features of the Code of Ethics, particularly those that stress the moral character of the executive and the organization itself.

Approved by the Board & Governors of the American College of Healthcare Executives on August 18, 1995.



GREATER AUSTIN CHAMBER OF COMMERCE

RESOLUTION

**Hotel Bed Tax Expansion For Convention
Center Expansion and Waller Creek Tunnel**

WHEREAS, the RUDAT Study and the city's convention center consultant have concluded that the Austin Convention Center has been highly successful and needs to be expanded; and,

WHEREAS, an expansion will attract more and larger sized conventions which will create more jobs and economic activity in the Austin region; and,

WHEREAS, a strong consensus has emerged to construct a tunnel to control flooding on Waller Creek, thereby creating a much-desired downtown recreational and economic amenity, while preventing possible flooding of several dozen buildings in the event of severe rains in the Waller Creek watershed; and,

WHEREAS, the Austin City Council has instructed the City Manager to call an election to finance these projects by raising the hotel-motel bed tax by two percent; and,

WHEREAS, the proposed financing mechanism of revenue bonds impacts visitors and other users of facilities rather than directly impacting the property or sales tax that Austin residents pay; and,

WHEREAS, a May election will focus attention on this issue and method of finance before a broader city infrastructure bond election tentatively scheduled for later this year; and,

WHEREAS, collaboration with other taxing jurisdictions to form a tax increment financing (TIF) district will help to finance additional projects and enhance the success of the convention center and Waller Creek area;

THEREFORE, BE IT RESOLVED that the Executive Board of the Greater Austin Chamber of Commerce endorses the bed tax financing mechanism to expand the convention center and construct the Waller Creek Tunnel and urges meaningful collaboration on creation of a TIF; and,

BE IT FURTHER RESOLVED that the Chamber supports the development and implementation of a Waller Creek master plan including mixed use that best serves the entire community and enhances the Waller Creek Comdor and, furthermore, the Chamber will actively encourage its members to support this spring bond election.

Adopted on this 2nd day of February, 1998 by the Executive Board of the Greater Austin Chamber of Commerce.

F. Gary Valdez
1998 Board Chair

Glenn E. West, CCE
President & CEO



GREATER AUSTIN CHAMBER OF COMMERCE

RESOLUTION

Byrd-Gramm Amendment to the Intermodal Surface Transportation Efficiency Act

WHEREAS, the Greater Austin Chamber of Commerce has a long standing position of supporting improvements to transportation infrastructure;

WHEREAS, the Nation's transportation infrastructure plays an integral part in the Nation's economy, and the Texas transportation system is a key component of the National network; and

WHEREAS, the upcoming reauthorization of federal surface transportation programs represents a critical opportunity to ensure that federal transportation funds provided to support the nation's transportation network are sufficient to support an effective response to the true needs of a modern transportation system; and

WHEREAS, the enactment of Senate Bill 1173, as amended by the Byrd-Gramm Amendment, would authorize the use of an additional \$6.1 billion per year from the Highway Account of the Federal Highway Trust Fund for highway infrastructure, making an additional \$30.9 billion in contract authority available for highways during a five-year period; and

WHEREAS, the increases in federal funding support for surface transportation provided by the Byrd-Gramm Amendment are fully funded through federal motor fuel tax revenues recently redirected to the Highway Trust Fund by the Taxpayer Relief Act of 1997;

THEREFORE, BE IT RESOLVED that the Executive Board of the Greater Austin Chamber of Commerce fully supports the intent of this amendment as vital to the mobility needs of Texas including the Austin region and urges the members of the United States Congress to adopt the Byrd-Gramm Amendment;

Adopted on this 11th day of February, 1998 by the Executive Board of the Greater Austin Chamber of Commerce.


F. Gary Valdez
1998 Board Chair


Glenn E. West, CCE
President & CEO

Draft

1999 Legislative Program

Texas Association of Business & Chambers of Commerce
(as of July 31, 1998)

Economic Development

Electric utility restructuring. Support electric utility restructuring which promotes an orderly transition to full and fair competition among electric energy providers for all classes of customers; preserves and promotes a reliable Texas electric infrastructure; and is in the best interest of all Texas businesses, energy producers and consumers.

Enterprise zones. Support efforts to streamline administration of the Texas Enterprise Zone Act in order to maximize participation of private investment.

Initiative & referendum. Oppose efforts to enact an initiative and referendum process in Texas. The initiative and referendum process, which undermines the state's present representative form of government, has compelled businesses in other states to wage expensive campaigns to defend against anti-business initiatives.

Tax abatements & other economic development incentives. Support local control and flexibility in the usage by taxing units of tax abatements, tax increment financing (tifs), reinvestment zones and other incentives to promote economic development and job creation

Transportation. Support development and funding of "international trade corridors" through Texas to accommodate current and future transportation demands resulting from the North American trade expansion; support improved highways, ports of entry, and other infrastructures that facilitate the movement of goods and people through Texas.

Workforce/Education

Accountability. Support academic accountability for students and both academic and fiscal accountability for teachers, principals and school administrators.

Educated workforce. Support education and job-training programs that equip students with specific skills needed for the workplace.

Employer driven workforce system. Support efforts which encourage a broader, more significant and substantial business presence in the planning, delivery, oversight and use of the new Texas workforce system.

- **Charter schools.** Support expansion of the current limit on open enrollment charter schools in

Texas and support uniform administrative criteria.

Federal block grants. Support efforts to fund state workforce programs through federal block grants with maximum flexibility on the use of the funds.

Increased competition. Support expansion of programs which create competition in order to improve performance and decrease administrative costs of public schools.

Literacy. Support legislation that results in Texas students acquiring necessary reading skills at grade level by the third grade.

Social promotion. Support requiring students to successfully complete all course requirements before advancement to the next grade.

Teacher preparation and training/criteria based curriculum. Support certification, training for teachers on the use of technology, and use of allotments.

Workforce. Continued support of Texas workforce system to enable the system to develop and stabilize by opposing changes to current workforce law.

Workforce Commission Skills Development Fund. Support efforts to enhance or expand the Skills Development Fund and similar programs which require employer's participation and oversight of job training initiatives.

Employment Relations

Drug testing. Oppose attempts to restrict the rights of employers to conduct random and/or universal drug testing of employees.

Employment-at-will. Oppose legislation which would erode employment-at-will as a right for all Texas employers and employees.

Employer control over work environment. Support efforts to maintain the employer's prerogative to control the workplace, thereby creating a safe, satisfying and harmonious working environment.

Employer references. Support legislation to protect employers from liability for good faith disclosure to a prospective employer of information about a current or former employee.

Fair Labor Standards Act reform. Support efforts to reform the wage and hour law by allowing more flexibility for employers and employees in hours worked during a pay period before mandating overtime pay.

Minimum wage. Oppose arbitrary increases in minimum wage which cannot be supported by improvements in productivity and which deprive many entry-level workers of job opportunities.

Payday law reform. Support reform of the Payday law to achieve greater consistency

with provisions of federal law and provide an administrative appeal process at the Commission level to reduce the cost of litigation.

Productivity and **jobs**. Oppose initiatives which ignore productivity and free-market principles, and which destroy jobs.

Right-to-work. Support efforts to keep Texas a right-to-work state and oppose agency shop legislation.

Unemployment insurance **reform**. Support unemployment insurance reform to improve administrative effectiveness and reduce the burden to employers.

Union dues **check-off**. Oppose efforts to allow public employees or require private employers to subsidize or promote labor unions or similar organizations through payroll collection of dues and contributions.

Environmental Quality

Alternative fuels for fleets. Support Texas law which makes the Texas alternative fuels for fleets program more consistent with federal guidelines for reducing vehicle emissions and less burdensome for affected fleet operators.

Cost of **federal/state** regulations. Support Texas law that requires state environmental agencies to estimate the cost and the net benefits to regulated entities before adopting any major proposed rule; and oppose legislation which places additional requirements on business and industry without appreciable benefit to the environment.

Environmental audits. Support Texas law that encourages environmental compliance by allowing the use of a self-evaluation privilege that protects a company's voluntary environmental and health and safety audit from being used in legal actions against the company under certain conditions.

Environmental education. Support activities that promote a balanced perspective in environmental education based on sound science for teachers and students in Texas public schools.

Environmental fees. Oppose the imposition of new or additional fees to pay for environmental quality programs unless such fees are broad-based user fees and unless such programs demonstrate critical environmental needs impacting health and safety.

Fund balances. Oppose legislative efforts to sweep balances from state environmental funds built up from cost recovery fees on business and industry, and support making those fund balances available for environmental program appropriations or lowering program fees.

Global climate change. Opposes any federal or state government actions regarding climate change that could adversely affect the international competitiveness of the U. S. marketplace economy, and base any climate change policies on voluntary, cost-effective actions by the marketplace, involving all **U.S.** trading partners.

Incentives instead of mandates. Support incentives for business to meet and exceed environmental compliance laws, increasing environmental effectiveness and operational flexibility.

One call for pre-excavation notification. Support Texas law which created a single, statewide pre-excavation notification center in the interest of public safety and security

Public/private partnerships. Support legislation that encourages more public/private partnership activities like the voluntary state program for permitting grandfathered sources of air emissions.

Rights of property owners. Continue to support balanced environmental laws that protect the environment without halting land development vital to the economic growth which sustains the livelihood of working Texans.

Standing in contested cases. Support Texas law that prohibits the state environmental agency from granting party status in a contested case hearing unless a justifiable or economic interest in the permit activity can be demonstrated.

Streamlining the permit process. Support legislation to streamline the permitting process to ensure that business can maintain environmental compliance and at the same time minimize roadblocks that result in expensive procedural delays.

Health Care

- **ERISA.** Preserve employer, employee and health care system benefits of ERISA by opposing any further attempts to erode the federal preemption of state law relating to health benefit plans, and protect employer administration of self-insured plans from any federal causes of action or exposure to state courts.

Fraud & abuse. Eliminate fraud and abuse in public and private sector health programs.

Individual responsibility. Encourage employees to take greater responsibility for their own health care.

Mandated benefits. Assure that the high cost of mandated benefits, services and other requirements to employers and employees is fully considered in legislative decision-making.

Market flexibility. Support the need for market-driven health policies that maximize consumer and public benefit.

Medical information. Foster medical information for health care purchaser and consumer decision-making including the collection and sharing of cost and quality data and stimulate improvements in quality of care.

Medical innovation. Encourage medical and health benefit plan flexibility and innovation to

maximize consumer choice,

- **Medical liability.** Prevent needless increases in cost and litigation through the expansion of employer and health plan liability by opposing any legislation or existing statute that creates or expands causes of action against employers and insurance carriers for medical negligence or harm incurred by health care providers.

Medical savings accounts. Empower individuals to better handle their share of health care costs and improving access to coverage through the expansion of Medical Savings Accounts, enabling employees to use pre-tax dollars to pay for health care services, creating more accountability for health care purchasing decisions and allowing individuals a federal income tax deduction for purchasing health coverage.

Quality care. Recognize that all Texans should receive the right care at the right time in the right setting.

Special interest regulation. Support making coverage more affordable by eliminating so-called "patient protection," "any willing provider" and other managed care regulations that increase costs and undermine the concept of a free market for contractual medical services without contributing to the quality of care.

International Trade

Border Environmental Quality. Continue support for cooperation and monitoring of environmental standards along the Texas/Mexico border to achieve a proper balance which is equitable to Texas employers and border communities.

Fast track authority. Support legislation which expands free trade through renewal of presidential "fast track" authority and extension of NAFTA and other free trade initiatives.

Immigration. Support legislation which increases H-1B Visa Caps to assure access by Texas employers to highly skilled workforce.

Most Favored Nation status for China. Support continued congressional approval of the president's renewal of the Most Favored Nation status for China and urge the administration to take appropriate action to enforce existing trade agreements with China.

Transportation. Support improved highways, ports of entry, and other infrastructures that facilitate trade, tourism and other legitimate cross-border traffic between Texas and Mexico; support development and funding of "international trade corridors" through Texas to accommodate current and future transportation demands resulting from the North American trade expansion.

Taxes & Spending

Budget surplus. Support returning budget surpluses to business as well as individual taxpayers through tax reductions.

Federal funds. Support state policies and programming which maximize receipt and use of federal funding.

Federal Unemployment Tax Repeal. Support the federal Unemployment Security Financing Act (H.R.3684), which would increase the **flow** of dollars from the Federal Unemployment Tax back to states, streamline how the tax is collected, and repeal the "temporary" 0.2% surcharge employers have been paying since **1976**.

Fiscal policy. Require government at every level to practice fiscal responsibility. For the federal government, this includes no deficit spending and strictly limiting increases in spending to no greater percentage than the increase in personal income.

Gross receipts user fees. Oppose any attempt to retroactively or prospectively impose a percentage of gross receipts user fee or street crossing surtaxes on the transmission of natural gas, crude oil petroleum products, petrochemicals and other goods, through pipelines.

Incentives. Support government tax policy, including exemptions, the net effect of which is to promote investment to create new jobs and expanded economic activity.

Inventory tax. Support elimination of the inventory tax. Texas is one of only six states that levies a property tax on inventories generally, placing the state at a severe economic disadvantage.

Location of payor. Oppose any changes in the current Texas franchise tax location of payor rule.

Mandates. Oppose unfunded government mandates which shift the cost of mandated programs to either the private sector or other levels of government.

- **Privatization.** Encourage privatization efforts in government which foster greater efficiency and reduce government spending.

Regulatory policy. Maintain a regulatory climate which does not impose hidden taxes on employers through excessive fees and fines, and reduces excessive regulations to promote, rather than impede, economic growth and job creation.

Research and development tax incentive. Support tax incentives for companies with research and development activities.

Right of way fees. Support legislation to promote consistency among municipalities in right-of-way fees assessed telecommunications providers, electric utilities and pipeline companies with facilities in city rights of way, to limit such fees to city cost of administration and maintenance of the rights of way, and to assess such fees in a competitively neutral manner.

Small business franchise tax relief. Support franchise tax relief for small business.

- State tax system. Support a balanced state tax system that encourages the savings and investments necessary for the creation of jobs and that does not place a disproportionate share of the tax burden on employers.

Tort Reform

Chamber liability. Support legislation to give volunteer chamber directors and service volunteers the same protection from personal liability as currently permitted by Texas law for charitable organizations.

Class action lawsuits. Support legislation and/or Texas Supreme Court action to reform class action lawsuits to assure they adequately protect the rights of parties to fair resolution of their claims.

Government litigation. Prohibit or restrict governmental entities from engaging outside counsel to litigate on behalf of the government on a contingency fee basis.

Homeowners and landowners liability. Limit liability of premise owners for acts of criminals; reinstate assumption of the risk defense for premises owners and managers, extend current law protecting a landowner who gives permission to use his land for recreation to all premises in both rural and urban areas and include both recreational and athletic uses.

Judicial selection. Support a process that places greater emphasis on the quality and diversity of the state judiciary and is less reliant on political campaigns and contributions.

Settlements. Encourage the settlement of lawsuits by supporting legislation that would provide that a plaintiff or defendant who rejects a settlement offer, but loses materially more or fails to recover materially more than the last offer, would bear the opponent's trial and attorney fee costs from the date of the offer, with suitable provisions shielding innocent personal injury claimants, small consumers and other litigants having little economic power.

Third-party liability. Support legislation which would prevent multiple recovery against third parties for injuries sustained on a jobsite that are compensable under workers' compensation insurance.

Year **2000** computer liability. Support legislation to limit year 2000 computer liability for employers.

Workers' Compensation

Benefit payments during appeal. Support legislation establishing the carriers' right to recover benefit payments ordered on decisions which are under appeal.

Co-employers: Support legislation closing employer liability loophole which currently permits an employee to collect workers' compensation and simultaneously sue employer's parent or sister corporation for common law damages.

- Failure to appear. Allow the TWCC, after a hearing, to order a suspension of temporary income benefits or impairment income benefits for failure of a claimant to appear for required medical examinations, and/or failure to appear for hearings.

Funding. Support adequate funding of the TWCC to enable the Commission to efficiently and fully carry out its statutory and regulatory duties.

Health & safety. Support cost-effective health and safety measures in the workplace.

Impairment ratings. Preserve the objectivity of the workers' compensation system by retaining the current medical impairment guidelines, opposing any attempt to raise impairment benefit payment amounts and supporting the monitoring of the impairment income benefits system.

Mandatory workers' compensation. Oppose legislation to establish a mandatory workers' compensation system in Texas.

Medical advisory committee. Oppose efforts to expand the role of the Medical Advisory Committee unless membership is restructured to provide greater non-provider representation.

Medical costs. Oppose legislation which would weaken medical cost containment provisions of current law, including pre-authorization, treatment plans, fee guidelines and similar cost containment provisions.

Mental health. Oppose legislation designed to expand or broaden the parameters of the mental health treatment guidelines or to authorize psychologists as treating physicians.

Opinion of chosen doctor. Support legislation to clarify that claimants and carriers may not appeal the opinions of their chosen doctor in the medical treatment and dispute process.

Prosecution of fraud. Support the efforts of prosecutors and other law enforcement officials to vigorously prosecute workers' compensation fraud cases.

Retaliatory discharge. Support legislation to limit damages and restrict the scope of actions filed by a terminated employee for workers' compensation retaliatory discharge.

Return-to-work. Support policies which encourage the safe return of employees to work as soon as possible.

Settlements. Oppose legislation designed to reintroduce lump sum settlements into the workers' compensation system, including medical lifetime benefits.

- Zero tolerance for illegal drugs. Support legislation which encourages zero tolerance for the presence of alcohol or illegal drugs on the job.



Medical Records Confidentiality

February 1334

Statement of the Issue

Medical care is among the most personal services rendered in our society. Yet to deliver this care, scores of healthcare personnel must have access to intimate patient information. To receive high-quality medical care, patients must feel free to reveal this data. In return, the healthcare system offers patients a guarantee of confidentiality.

But that promise is getting harder to keep. Information systems technology allows instant retrieval of medical information, widening access to a greater number of people. Within healthcare organizations, personal information contained in medical records is reviewed not only by physicians and nurses, but also by professionals in areas such as social work, rehabilitation, pharmacy, accounting, and quality assurance.

Society also has multiple needs for patient information and, in recent years, demands from external parties have escalated dramatically. Attorneys request data to pursue legal actions. Employers use it to screen candidates and design benefits programs. Media representatives also seek access to medical information, particularly when a patient is a public figure or when treatment involves legal or public health issues. And to reimburse providers and conduct quality reviews, government agencies and third-party payors demand specific medical information.

Society cannot ignore that exceptions to patient confidentiality are often necessary—to promote public health, to protect children and spouses from abuse, to control employers' benefits costs, and to reimburse providers for care. Nevertheless, the rights of individual patients must be maintained. A balance must exist between society's needs for information and the right of patients to confidentiality.

Policy Position

The American College of Healthcare Executives believes that all healthcare executives have a moral and professional obligation to protect the confidentiality of patients' medical records. As patient advocates, executives must weigh legitimate requests for information against demands that might lead to the inappropriate release of medical records.

While the healthcare organization owns the health record, the information in that record remains the patient's personal property. Organizations must release some information to comply

with the law, but in most cases, patients have a right to formally authorize release.

In fulfilling their responsibilities, healthcare executives should seek to:

- Limit access to patient information to authorized staff only.
- Ensure that institutional policies on confidentiality and release of information are consistent with state and federal regulations.
- Educate healthcare personnel on confidentiality issues and take steps to ensure all employees are aware of and understand their responsibilities to keep patient information confidential.
- Safeguard medical record files and computerized data with security and storage systems that both protect against unauthorized access and mask patient identity.
- Establish guidelines for masking patient identity in committee minutes and other working documents where the identity is not necessary.
- Ensure that policies concerning the right of patients to have access to their own medical records are clearly established and understood by appropriate staff.
- Create guidelines for securing necessary permissions for the release of medical information for research, education, utilization review, and other purposes.
- Adopt a specialized process to protect sensitive information such as psychiatric, HIV status, or substance abuse treatment records.
- Identify special situations which require consultation with senior management prior to release of information.
- When appropriate, seek written agreements that detail the obligations of confidentiality for individuals and agencies who receive medical records information.
- Consult with media representatives to develop procedures for public release of patient medical information.
- Educate patients about organizational policies on confidentiality, including reasons why information is released.
- Participate in the public dialog on confidentiality issues such as employer use of healthcare information and public health reporting.

The American College of Healthcare Executives urges all healthcare executives to maintain an appropriate balance between the patient's right to confidentiality and the right of access to medical information.

Approved by the Board of Governors of the American College of Healthcare Executives on February 21, 1994.